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Research News for the U.S. Travel Industry

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TRAVEL PRINTOUT

US Travel Data Center

October 1988 Volume 17, Number 10

Travel Demand Will Continue to Grow Through 1989

Travel demand remains strong in 1988, and forecasts presented at the US Travel Data Center's 1989 Travel Outlook Forum, co-sponsored by the Travel and Tourism Research Association (TTRA), suggest travel will continue to grow modestly before striking rough weather in 1990.

The Conference Board projects that GNP will rise 7 percent by the close of 1988, and consumer expert, Richard Curtin, says consumer confidence has returned to levels abandoned following the stock market crash of October 1987.

Although the cost of travel has risen faster than overall consumer prices, the Data Center's National Travel Survey reports that Americans have increased their travel by 5 percent in the first seven months of this year.

Outlook for 1989 includes:

* The U.S. Travel and Tourism Administration predicts inbound foreign travel will increase 7 percent in 1989, and outbound travel to increase 3 percent.
* First Boston expects the airlines to show a 5 percent jump in passenger miles by the end of 1989, with operating revenue up 8 percent.
* Amtrak estimates that passenger revenues will be up 4 percent, following a 16 percent increase in 1988, its first billion dollar year.
* Dr. Richard Curtin forecasts a 1.4 percent real gain in durable goods purchases, a significant factor to the travel industry.
* The National Park Service predicts an encouraging 3 percent increase in visitors next year, and expects to collect $50 million in user fees in 1989.

The complete, edited proceedings of the 1989 Travel Outlook Forum will be released in January as The 1989 Outlook for Travel and Tourism. Copies will be sent to Data Center and TTRA members and is available for $100, prepaid, from the US Travel Data Center, 1133 21st St. NW, Washington, D.C. 20036. ##

1987 Full Year Report Coming in November

Travel reached its highest level in the past seven years in 1987, recording 1.19 billion person-trips, a 6 percent increase over 1986.

Business travel and weekend travel both increased 9 percent over the previous year. Fifty-five percent of all person-trips taken by Americans ages 18-34 occured over a weekend compared to 42 percent for ages 35-54, and 41 percent for the 55+ segment.

U.S citizens were most prone to travel by automobile, on vacation, without children and for pleasure reasons, during 1987, with the Southeast as the most popular destination choice.

Every travel segment showed an increase in 1987, except the 55+ age group, which fell 8 percent.

These and other measures of U.S. travel will be released in the Data Center's 1987 Travel Executive Briefing, and a companion report of segment

(continued on page 3)

Motor Fuel Costs Lead August Travel Price Increase

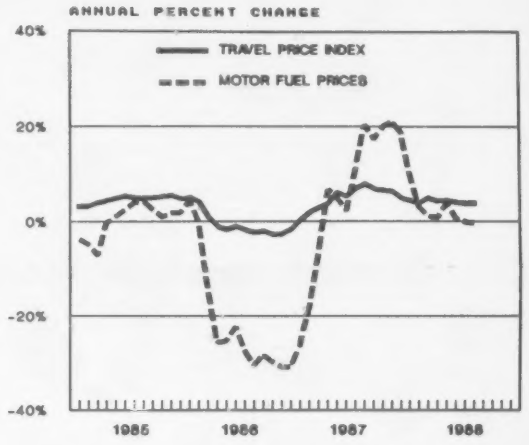
Rising motor fuel costs drove the overalll cost of travel in August up 0.8 percent according to the US Travel Data Center's latest Travel Price Index (TPI).

The TPI, which measures changes in the seasonally unadjusted prices of lodging, food, transportation and other goods and services purchased by Americans traveling away from home in the United states, reached 122.3 (1982-84=100) in August.

For comparison, the overall cost of consumer goods and services, as measured by the Consumer Price Index (CPI), rose 0.4 percent in August.

Motor fuel and lodging prices led travel price increases for August 1988, growing 2.2 percent and 1.4 percent respectively over July. However, airline fares and the cost of intracity public transportation were unchanged.

The August TPI gained 4 percent when compared to the same month one year ago. The CPI also registered a 4 percent increase over year-earlier figures. Lodging prices led all other components with a 6 percent increase over August 1987 levels.



Other intercity transportation increased 5.6 percent, followed by entertainment costs, up 5.4 percent. Motor fuel showed the only decline by comparison. ##

Monthly and Annual Rates of Change in the Travel Price Index and Components
August 1988

TPI Component	Monthly Percent Change July 1988 to August 1988	Annual Percent Change August 1987 to August 1988
Transportation	1.2	0.4
Airline Fares	0.0	0.9
Other Intercity Trans.	0.2	5.6
Intracity Public Trans.	0.0	2.8
Motor Fuel	2.2	-0.2
Lodging	1.4	6.0
Food and Beverages Away From Home	0.3	4.3
Entertainment	0.7	5.4
TRAVEL PRICE INDEX	0.8	4.0
CONSUMER PRICE INDEX	0.4	4.0

Source: US Travel Data Center and U.S. Bureau of Labor Statistics

TRAVEL PRINTOUT is published monthly by the US Travel Data Center, the national non-profit center for travel and tourism research, and an affiliate of Travel Industry Association of America, Two Lafayette Centre, 1133 21st Street NW, Washington, D.C. 20036. Telephone: 202/293-1040. Suzanne D. Cook, Director. Ida Simmons, Editor. Julie Bowers, Assistant Editor.

Travel Printout reports on Data Center Projects, national travel research conducted by other respected organizations, and trends in the U.S. travel industry. Subscriptions are $70 per year, U.S., Canada and Mexico; other foreign countries, $80 per year, payable in U.S. funds only. ISSN: 0744-6233.

July Vacation Travel Jumps a Surprising 10 Percent

Overall U.S. travel increased 3 percent in July, while vacation travel increased an incredible 10 percent, according to the Data Center's latest National Travel Survey.

The monthly telephone survey reports that Americans took 152 million person-trips during July. (A person-trip is one person traveling 100 miles or more away from home.)

Vacation person-trips soared to 118.6, surprising the travel research center, which had predicted a 4 percent increase overall in summer vacation travel. Weekend travel in July increased 7 percent.

While business travel and pleasure travel both rose 4 percent, travel for personal and other purposes decreased in July.

Average trip duration fell to 5.3 nights from 5.6 nights one year ago, while average trip distance increased to 960 miles, up from 860 miles in July 1987.

Hotel/motel person-trips increased to 68.3 million, a 5 percent gain.##

Travel (continued from page 1)

tabulations, 1987 Travel Market Close-Up, in November. These reports will be sent to Data Center members, but are available to others for $135 each, prepaid, or $250 for both reports, from the US Travel Data Center, 1133 21st St. NW, Washington, D.C. 20036.##

Order 1988 Travel Trends Slides

Data Center Members Only: Copies of the slides shown during Dr. Suzanne Cook's speech, "Travel Trends in 1988," presented at the Data Center's 1989 Travel Outlook Forum, are available for purchase.

For more information, contact Ida Simmons, marketing manager, at 202/293-1040.##

Visitor Volume at National Parks Region	JULY 1988 visits	Percent change from JULY 1987*	Percent change 1988/1987* Year-to-Date
NEW ENGLAND	2,617,648	-3	-1
MIDDLE ATLANTIC	4,702,043	-23	-13
SOUTH ATLANTIC	12,388,635	-4	3
EAST SOUTH CENTRAL	2,976,595	10	10
EAST NORTH CENTRAL	1,300,684	13	13
WEST NORTH CENTRAL	2,137,047	4	5
WEST SOUTH CENTRAL	1,403,613	13	4
MOUNTAIN	7,045,709	2	4
PACIFIC	7,393,545	8	1
TOTAL	41,965,519	-1	1

* Percent change figures may not be consistent with those previously reported due to National Park Service revisions.

States comprising the Census regions:
New England: Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont. **Middle Atlantic:** New Jersey, New York, Pennsylvania. **South Atlantic:** Delaware, District of Columbia, Florida, Georgia, Maryland, North Carolina, South Carolina, Virginia, West Virginia. **East South Central:** Alabama, Kentucky, Mississippi, Tennessee. **East North Central:** Illinois, Indiana, Michigan, Ohio, Wisconsin. **West North Central:** Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota, South Dakota. **West South Central:** Arkansas, Louisiana, Oklahoma, Texas. **Mountain:** Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, Wyoming. **Pacific:** Alaska, California, Hawaii, Oregon, Washington.

Current Travel Indicators

CURRENT TRAVEL INDICATORS

	Current Month	Current Value	Percent Change: Previous Month	Percent Change: Year-ago Month	Percent Change: Year to date
Establishment receipts or retail sales					
Hotels, motels and other lodging places(1)	Jul	$ 4,720 million	-2.5	10.7	8.9
Eating and drinking places(2)	Jul	$13,011 million	0.9	6.3	4.4
Gasoline service stations(2)	Jul	$ 8,923 million	-0.4	1.4	5.5
Commercial lodging demand					
Hotel/motel occupancy rate(3)	Jul	62.8 percent	0.3	1.5	0.7
Real demand for commercial lodging(4)	Jul	63.0 million	0.0	5.5	4.6
Airline passenger traffic(5)					
Domestic revenue passenger-miles	Jul	29.6 billion	5.0	0.9	0.7
International revenue passenger-miles	Jul	10.2 billion	13.2	13.8	19.4
Highway traffic volume(6)					
Rural arterial vehicle-miles	Jul	48.3 billion	8.0	4.8	5.1
Rail passenger traffic(7)					
Amtrak passenger-miles	Jul	590.1 million	12.3	0.6	10.9
Travel Price Index(8)	Jul	121.3	0.9	3.9	4.4
U.S. resident travel					
Total person-trips (9)	Jun	9 million	22.8	2.6	4.7
Vacation person-trips (9)	Jun	4.6 million	32.5	10.0	9.0
Total person-nights (10)	Jul	806.1 million	-66.2	-0.6	-3.3
Vacation person-nights (10)	Jul	679.9 million	45.9	7.6	-2.2
Public use of national parks(11)					
Visits	Jul	41,965,519	20.3	1.0	1.0
Overnight stays	Jul	3,294,560	27.3	-2.0	1.0
Foreign arrivals in U.S.					
From overseas (12)	Jun	1,140,042	10.3	19.3	21.8
From Canada (13)	Jul	1,922,007	94.3	18.6	10.3
From Mexico (12)	Jun	82,962	22.8	3.5	7.6
U.S. citizen departures					
To overseas (12)	May*	1,166,058	9.5	4.1	4.3
To Canada (13)	Jul	2,450,118	60.4	2.8	0.9
Domestic demand for motor gasoline(14)					
Barrels per day	Jul	7,473 thousand	-4.7	-1.3	1.8

* June data not yet available

98

(1) Source: Smith Travel Research, seasonally unadjusted. (2) Preliminary; revised monthly. Source: Bureau of the Census. (3) Source: Smith Travel Research, seasonally adjusted, 1986 and 1987 data have been revised. (4) Smith Travel Research, unadjusted room nights sold. (5) Preliminary; U.S. scheduled service air carriers. Source: Air Transport Association. (6) Preliminary; revised monthly. Source: Federal Highway Administration. (7) Source: National Railroad Passenger Corporation (Amtrak). (8) Source: US Travel Data Center and Bureau of Labor Statistics. (9) Source: US Travel Data Center. (10) US Travel Data Center. Data are not comparable to earlier published numbers due to revised methodology. (11) Preliminary; unadjusted for differences in reporting units. Source: National Park Service. (12) Source: U.S. Travel and Tourism Administration. Mexican data reflect 1% arrivals only. (13) Statistics Canada. (14) Preliminary; Source: U.S. Department of Energy.

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TRAVEL PRINTOUT

US Travel Data Center

November 1988 Volume 17, Number 11

U.S. Travel Reaches Highest Level in 7 Years

During 1987, overall U.S. travel increased 6 percent over 1986, reaching its highest level in seven years, according to the US Travel Data Center's National Travel Survey.

The monthly telephone survey, now in its 10th year, reported Americans took 1.19 billion person-trips in 1987, surpassing the record set in 1981. (A person-trip is one person traveling 100 miles or more away from home.)

These estimates and other measures of travel are contained in two new Data Center reports: a brief summary of 1987 travel activity, the 1987 Travel Executive Briefing: A National Travel Survey Summary, accompanied by the 1987 Travel Market Close-Up: National Travel Survey Tabulations.

Says Data Center Director, Dr. Suzanne Cook, "Relatively stable travel prices, strong consumer spending patterns and employment growth have combined to create a favorable environment for Americans who travel."

According to the report, business travel increased 13 percent over year-earlier levels and accounted for one-quarter of all travel in 1987. Moreover, travel for pleasure, the motive behind 76 percent of all trips, increased 5 percent, while weekend travel rose 9 percent over 1986.

In 1987, hotel stays of one or more nights increased 14 percent as the number of trips including hotel visits surpassed the 300 million mark for the first time in five years.

U.S. air travel soared to a 7 percent increase due in part to stabilizing air fares. Auto travel, also rising 7 percent, captured three-fourths of total travel compared to 20 percent for air.

The South-Atlantic census region attracted the most U.S. travelers in 1987 (20 percent), followed by the Pacific region (15 percent) and the East North Central region (12 percent).

The 1987 Travel Executive Briefing and Market-Close-up are based on interviews with 1,500 U.S. residents each month in 1987. The reports are available for $135 each, prepaid, or $250 for both from the US Travel Data Center, 1133 21st Street NW, Washington, D.C. 20036. ##

Discover America Through the Year 2000

Discover America 2000, a report commissioned by the Discover America Implementation Task Force, addresses what effects the changing demographic structure of the U.S. population will have on the travel industry by the beginning of the next century. The US Travel Data Center compiled and synthesized a comprehensive array of demographic statistics, consumer survey results, observations of a number of social analysts and futurists, as well as the opinions of a variety of tourism professionals who participated in the study.

(continued on page 3)

Reduced Lodging Prices Lead September Travel Cost Decline

Declines in lodging and motor fuel costs led the 1.4 percent decrease in the cost of travel during September, according to the US Travel Data Center's Travel Price Index (TPI).

The TPI, which measures changes in the seasonally unadjusted prices of lodging, food, transportation and other goods and services purchased by Americans traveling away from home in the United States, dropped to 120.6 (1982-84=100) in September.

For comparison, overall consumer goods and services costs, as measured by the Consumer Price Index (CPI), rose 0.7 percent during the same time.

Lodging prices fell 5 percent in September, the largest drop in the cost of lodging while out of town since June of 1984. Motor fuel costs declined by 1.2 percent, while entertainment costs dipped 0.2 percent in the monthly comparison.

The September TPI gained 3.1 percent over September 1987, while the CPI rose 4.2 percent during the same period. ##

August Vacation Travel Rises 8 Percent

Overall travel during August showed little change; however, vacation travel increased 8 percent, according to the latest National Travel Survey.

The monthly telephone survey shows that Americans took 152.4 million person-trips during August. (A person-trip is one person traveling 100 miles or more away from home.)

Travel for business/convention purposes fell 16 percent from August 1987 levels, while weekend travel decreased 6 percent.

Travel by air increased 6 percent and auto travel rose 4 percent to 123.3 million person-trips. Hotel use fell 2 percent.

Average trip duration in August dipped to 4.5 nights, down from 4.9 nights in 1987. Average distance rose to 970 miles, up from 840 miles last August. ##

Monthly and Annual Rates of Change in the Travel Price Index and Components

September 1988 TPI Component	Monthly Percent Change August 1988 to September 1988	Annual Percent Change September 1987 to September 1988
Transportation	-0.5	-0.2
Airline Fares	0.4	0.6
Other Intercity Trans.	0.1	5.2
Intracity Public Trans.	0.0	2.5
Motor Fuel	-1.2	-1.1
Lodging	-5.0	3.5
Food and Beverages Away From Home	0.4	4.3
Entertainment	-0.2	4.2
TRAVEL PRICE INDEX	-1.4	3.1
CONSUMER PRICE INDEX	0.7	4.2

Source: US Travel Data Center and U.S. Bureau of Labor Statistics

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Travel Industry (from page 1)

The report is organized around seven generational groups now living in American society, from those born in 1977-88 (Baby Boomlets) to those born 1923 and earlier (World War I Babies). While data are presented describing each group today and in the year 2000, the report is not a forecast, but rather a set of logical extrapolations.

Discover America Key Implications

* Early Baby Boomers (born 1946-54), will reach the peak of their earning potential, and, because of the social environment in which they were raised, the less traditional vacation destination will hold great appeal.
* World War II Babies (born 1935-45) could be a good market for off-season travel, as well as group tours, cruises and recreation vehicle travel. While healthy and affluent, their upbringing could steer them to opportunities for social interaction and learning as part of their travel experience.
* World War I Babies offer the industry its first glimpse of what the year 2010 and beyond will resemble, when seniors will dominate the society much more than in the past.

By the year 2000, the U.S. will be wealthier, probably healthier and even more pluralistic than it is today. Slower population growth and intense competition for the consumer's attention will produce many challenges for our nation's travel industry.

To reserve your copy of the Discover America 2000 Report, contact the Travel Industry Association's marketing department at 202/293-1433. ##

Mark Your Calendar

Plan to attend the third annual Travel Review Conference, an important one day review of the past year's travel activity, designed to aid travel marketing and research managerial decision-making for 1989, on February 23, 1989, at the Grand Hyatt Hotel in Washington, D.C. For more information call 801/581-3351. ##

Visitor Volume at National Parks

Region	AUGUST 1988 visits	Change from AUGUST 1987* (percent)	Percent change 1988/1987* Year-to-Date
NEW ENGLAND	2,616,980	4	0
MIDDLE ATLANTIC	3,897,351	-31	-17
SOUTH ATLANTIC	11,252,690	-11	11
EAST SOUTH CENTRAL	2,728,423	14	11
EAST NORTH CENTRAL	1,154,932	8	14
WEST NORTH CENTRAL	1,949,397	-2	3
WEST SOUTH CENTRAL	1,043,973	2	3
MOUNTAIN	6,746,915	-	3
PACIFIC	7,408,924	-1	1
TOTAL	38,799,585	-7	3

* Percent change figures may not be consistent with those previously reported due to National Park Service revisions.

States comprising the Census regions:
New England: Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont. **Middle Atlantic:** New Jersey, New York, Pennsylvania. **South Atlantic:** Delaware, District of Columbia, Florida, Georgia, Maryland, North Carolina, South Carolina, Virginia, West Virginia. **East South Central:** Alabama, Kentucky, Mississippi, Tennessee. **East North Central:** Illinois, Indiana, Michigan, Ohio, Wisconsin. **West North Central:** Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota, South Dakota. **West South Central:** Arkansas, Louisiana, Oklahoma, Texas. **Mountain:** Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, Wyoming. **Pacific:** Alaska, California, Hawaii, Oregon, Washington.

Current Travel Indicators

CURRENT TRAVEL INDICATORS

	Current Month	Current Value	Percent Change: Previous Month	Percent Change: Year-ago Month	Percent Change: Year to date
Establishment receipts or retail sales					
Hotels, motels and other lodging places(1)	Aug	$ 4,855 million	2.9	10.1	9.0
Eating and drinking places(2)	Aug	$13,122 million	0.5	6.8	4.7
Gasoline service stations(2)	Aug	$ 9,111 million	1.8	1.9	5.0
Commercial lodging demand					
Hotel/motel occupancy rate(3)	Aug	62.6 percent	-0.3	1.3	0.9
Real demand for commercial lodging(4)	Aug	64.8 million	2.9	5.1	4.6
Airline passenger traffic(5)					
Domestic revenue passenger-miles	Aug	31.3 billion	5.7	1.7	-0.3
International revenue passenger-miles	Aug	10.6 billion	4.0	11.0	17.9
Highway traffic volume(6)					
Rural arterial vehicle-miles	Aug	48.6 billion	0.5	4.0	4.9
Rail passenger traffic(7)					
Amtrak passenger-miles	Aug *	588.3 million	-0.3	-0.1	9.1
Travel Price Index(8)	Aug	122.3	0.8	4.0	4.3
U.S. resident travel					
Total person-trips (9)	Aug	152.4 million	0.3	0.1	3.8
Vacation person-trips (9)	Aug	112.9 million	-4.8	8.1	8.9
Total person-nights (10)	Aug	686.6 million	-14.8	-5.4	-3.7
Vacation person-nights (10)	Aug	596.1 million	-12.3	3.4	-1.1
Public use of national parks(11)					
Visits	Aug	38,799,585	-7.5	-7.0	3.0
Overnight stays	Aug	3,178,556	-3.5	-7.0	-1.0
Foreign arrivals in U.S.					
From overseas (12)	Jul	1,577,944	38.4	23.0	22.1
From Canada (13)	Aug	1,913,376	-0.5	6.4	9.5
From Mexico (12)	Jul	151,398	82.5	12.5	8.9
U.S. citizen departures					
To overseas (12)	Jun*	1,505,650	29.1	10.5	5.6
To Canada (13)	Aug	2,196,532	-10.4	-5.2	-0.6
Domestic demand for motor gasoline(14)					
Barrels per day	Aug	7,511 thousand	0.5	2.7	1.9

* July data not yet available

(1) Source: Smith Travel Research, seasonally unadjusted. (2) Preliminary; revised monthly. Source: Bureau of the Census. (3) Source: Smith Travel Research, seasonally adjusted, 1986 and 1987 data have been revised. (4) Smith Travel Research, unadjusted room nights sold. (5) Preliminary; U.S. scheduled service air carriers. Source: Air Transport Association. (6) Preliminary; revised monthly. Source: Federal Highway Administration. (7) Source: National Railroad Passenger Corporation (Amtrak). (8) Source: US Travel Data Center and Bureau of Labor Statistics. (9) Source: US Travel Data Center. (10) US Travel Data Center. Data is not comparable to earlier published numbers due to revised methodology. (11) Preliminary; unadjusted for differences in reporting units. Source: National Park Service. (12) Source: U.S. Travel and Tourism Administration. Mexican data reflect I94 arrivals only. (13) Statistics Canada (14) Preliminary; Source: U.S. Department of Energy.

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TRAVEL PRINTOUT

US Travel Data Center

December 1988 Volume 17, Number 12

Travel Prices Decline For Second Consecutive Month

For the second consecutive month, the overall price of travel has declined, according to the US Travel Data Center's Travel Price Index (TPI).

The TPI, which measures changes in the seasonally unadjusted prices of lodging, food, transportation and other goods and services purchased by Americans traveling away from home in the U.S., dropped to 120.4 (1982-84=100) in October, the second consecutive monthly decline (see chart on page 2).

October travel costs declined 0.2 percent, due to a slight decrease in motor fuel prices, reports the latest TPI.

For comparison, overall goods and services costs, as measured by the Consumer Price Index (CPI), rose 0.3 percent in October.

Motor fuel costs fell 1.8 percent in October, while other intercity transportation showed a 0.7 percent decline. The price of lodging fell 0.6 percent in the monthly comparisons.

The declines in these components, coupled with marginal increases in airline fares and intracity public transportation costs, caused the overall price of transportation to decrease 0.9 percent in October.

The October TPI gained 3.7 percent when compared to the same month in 1987, while the CPI rose 4.2 percent during the same period. Motor fuel prices, the only component to show a decrease compared to October 1987, fell 1.9 percent. ##

Data Center Co-sponsors Travel Review Conference

The U.S. Travel and Tourism Administration (USTTA), Travel and Tourism Research Association (TTRA), and the US Travel Data Center (new co-sponsor) are jointly sponsoring the third annual Travel Review Conference, on February 23, 1989 at the Grand Hyatt Hotel in Washington, D.C.

Highlights include trends in 1988 domestic travel and international travel, as well as 1988 travel trends in transportation, leisure travel markets, accommodations and lessons learned from disasters in 1988.

For more information on the Travel Review Conference, contact Vernon Azucenas at the Data Center, 202/293-1040. ##

Foreign Visitors Spend Billions in U.S.

Foreign visitors spent an average of $15.4 billion a year in the United States and its territories during 1985 and 1986, according to a recent study conducted for the U.S. Travel and Tourism Administration (USTTA) by the US Travel Data Center.

The study's results, included in the Impact of Foreign Visitors' Spending on States' Economies 1985-86, show foreign visitors' spending alone supported 318,000 jobs, creating a yearly average of $3.5 billion in payroll income during 1985-86.
(continued on page 3)

Travelers Discover Frequent, Short Vacations

Americans, not merely content with taking the traditional one- or two-week vacation, have discovered they can break up the long wait between trips with weekend and long weekend vacations, according to the Data Center's monthly National Travel Survey.

In fact, if weekend vacation travel continues to increase at its present pace, it will grow 11 percent this year. (A weekend vacation is a vacation trip of one to five nights including a Saturday night.)

Overall vacation travel has risen 9 percent from January to August 1988 compared to the same period in 1987, while total travel has risen 4 percent during the same period.

However, the length of the average vacation has dropped slightly over the past two years compared to non-vacation stays. Americans are leaving home more often, but staying away for shorter periods of time.

Of the several explanations for this year's jump in weekend vacations, the most popular remains the vicissitudes of the economy. During low points in the nation's economy, travelers sacrifice weekend vacations to pursue longer vacations.

However, with the economy on an upswing and confidence in growing employment, consumers are more willing to add weekend trips to their travel plans. ##

Data Center Receives Education Award

The US Travel Data Center recently received the second annual Society of Travel and Tourism Educators (STTE) Award for its outstanding contribution to travel and tourism education. The award, funded by National Publishers, was presented by STTE's president, Dr. James Burke of the Rochester Institute of Technology and Earl Coleman, president of National Publishers, during STTE's annual banquet. ##

Monthly and Annual Rates of Change in the Travel Price Index and Components

October 1988 TPI Component	Monthly Percent Change September 1988 to October 1988	Annual Percent Change October 1987 to October 1988
Transportation	-0.9	-0.2
Airline Fares	0.2	2.0
Other Intercity Trans.	-0.7	4.8
Intracity Public Trans.	0.3	2.8
Motor Fuel	-1.8	-1.9
Lodging	-0.6	5.5
Food and Beverages Away From Home	0.3	4.4
Entertainment	0.8	3.4
TRAVEL PRICE INDEX	-0.2	3.7
CONSUMER PRICE INDEX	0.3	4.2

Source: US Travel Data Center and U.S. Bureau of Labor Statistics

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September Travel Climbs 5 Percent

September travel rose 5 percent over year-earlier levels, according to the latest results of the National Travel Survey.

The monthly telephone survey reports that Americans took 107.8 million person-trips during September 1988. (A person-trip is one person traveling 100 miles or more away from home.)

Vacation travel jumped nearly 8 percent over the previous year, travel for business/convention purposes rose 4 percent, while weekend travel showed a modest 2 percent increase over 1987 levels.

Travel by auto/truck/RV, which steadily increased through the summer months, rose 7 percent, while air travel increased 2 percent in September.

Use of hotels/motels climbed 7 percent above year-earlier levels for September.

Average trip duration remained constant with last year's figure, 4.4 nights, while the average round-trip distance rose from 850 miles to 980 miles. ##

Foreign Visitor Spending (continued from page 1)

Foreign visitors spent more on incidentals (gifts, souvenirs, and miscellaneous purchases) than any other category, including lodging, which was the number one expenditure category in a similar study of foreign visitor spending in 1983.

Nearly one-third of all foreign visitors' dollars were spent in the Pacific census region. California collected the most from foreign visitors, $3.2 billion, followed by Florida, $2.1 billion, and New York, $1.9 billion.

This report, which has already been sent to full members of the Data Center, is available to others for $50, prepaid, from the US Travel Data Center, 1133 21st St. NW, Washington, D.C. 20036. ##

Attention TIA members: This is the last issue of Travel Printout to be mailed separately to TIA members. Please see future editions of Newsline for important news and announcements from the US Travel Data Center. ##

Visitor Volume at National Parks

Region	SEPT 1988 visits	Change from SEPT 1987* (percent)	Percent change 1988/1987* Year-to-Date
NEW ENGLAND	1,859,643	3	0
MIDDLE ATLANTIC	2,606,772	-12	-17
SOUTH ATLANTIC	8,620,989	-6	-1
EAST SOUTH CENTRAL	2,068,033	10	11
EAST NORTH CENTRAL	572,981	2	12
WEST NORTH CENTRAL	932,034	5	4
WEST SOUTH CENTRAL	777,962	-4	2
MOUNTAIN	4,381,941	-5	2
PACIFIC	5,182,498	3	0
TOTAL	27,002,853	-3	-1

* Percent change figures may not be consistent with those previously reported due to National Park Service revisions.

States comprising the Census regions:
New England: Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont. **Middle Atlantic:** New Jersey, New York, Pennsylvania. **South Atlantic:** Delaware, District of Columbia, Florida, Georgia, Maryland, North Carolina, South Carolina, Virginia, West Virginia. **East South Central:** Alabama, Kentucky, Mississippi, Tennessee. **East North Central:** Illinois, Indiana, Michigan, Ohio, Wisconsin. **West North Central:** Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota, South Dakota. **West South Central:** Arkansas, Louisiana, Oklahoma, Texas. **Mountain:** Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, Wyoming. **Pacific:** Alaska, California, Hawaii, Oregon, Washington.

Current Travel Indicators

CURRENT TRAVEL INDICATORS

	Current Month	Current Value	Percent Change: Previous Month	Percent Change: Year-ago Month	Percent Change: Year to date
Establishment receipts or retail sales					
Hotels, motels and other lodging places(1)	Sep	$ 4,445 million	-8.4	5.5	8.6
Eating and drinking places(2)	Sep	$13,412 million	1.3	9.2	5.3
Gasoline service stations(2)	Sep	$ 9,018 million	-1.7	1.7	4.7
Commercial lodging demand					
Hotel/motel occupancy rate(3)	Sep	62.4 percent	-0.3	-0.5	0.8
Real demand for commercial lodging(4)	Sep	58.6 million	-9.8	3.5	4.5
Airline passenger traffic(5)					
Domestic revenue passenger-miles	Sep	24.5 billion	-21.8	4.1	0.1
International revenue passenger-miles	Sep	8.5 billion	-20.2	16.5	17.7
Highway traffic volume(6)					
Rural arterial vehicle-miles	Sep	42.2 billion	-13.2	3.9	4.8
Rail passenger traffic(7)					
Amtrak passenger-miles	Sep	424.2 million	-27.9	0.5	8.2
Travel Price Index(8)	Sep	120.6	-1.4	3.2	4.2
U.S. resident travel					
Total person-trips (9)	Sep	107.8 million	-29.3	5.1	4.0
Vacation person-trips (9)	Sep	69.0 million	-38.9	7.5	8.7
Total person-nights (10)	Sep	470.9 million	-31.4	5.9	-2.7
Vacation person-nights (10)	Sep	347.8 million	-41.7	8.7	-0.1
Public use of national parks(11)					
Visits	Sep	27,002,853	-30.4	-3.0	-1.0
Overnight stays	Sep	1,796,087	-43.5	-11.0	-2.0
Foreign arrivals in U.S.					
From overseas (12)	Aug	N/A			
From Canada (13)	Sep	1,173,093	-38.7	11.9	9.8
From Mexico (12)	Aug	N/A			
U.S. citizen departures					
To overseas (12)	Jul	1,649,044	9.5	8.4	5.8
	Aug	1,462,285	-11.3	4.6	5.6
To Canada (13)	Sep	1,421,178	-35.3	2.3	-0.3
Domestic demand for motor gasoline(14)					
Barrels per day	Sep	7,349 thousand	-2.2	2.5	2.0

N/A Not Available

(1) Source: Smith Travel Research, seasonally unadjusted. (2) Preliminary; revised monthly. Source: Bureau of the Census. (3) Source: Smith Travel Research, seasonally adjusted, 1986 and 1987 data have been revised. (4) Smith Travel Research, (unadjusted room nights sold. (5) Preliminary; U.S. scheduled service air carriers. Source: Air Transport Association. (6) Preliminary; revised monthly. Source: Federal Highway Administration. (7) Source: National Railroad Passenger Corporation (Amtrak). (8) Source: US Travel Data Center and Bureau of Labor Statistics. (9) Source: US Travel Data Center. (10) US Travel Data Center. Data is not comparable to earlier published numbers due to revised methodology. (11) Preliminary; unadjusted for differences in reporting units. Source: National Park Service. (12) Source: U.S. Travel and Tourism Administration. Mexican data reflect 19% arrivals only. (13) Statistics Canada (14) Preliminary; Source: U.S. Department of Energy.

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TRAVEL PRINTOUT
Research News for the U.S. Travel Industry

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Research News for the U.S. Travel Industry

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TRAVEL PRINTOUT

US Travel Data Center

January 1989 Volume 18, Number 1

State Travel Development Budgets Rise 9 Percent In 1988-89

State governments plan to spend over $317 million for travel and tourism development, according to the US Travel Data Center's 1988-89 Survey of State Travel Offices, the sixteenth annual report on the budgets, advertising, promotion and research programs of state tourism development agencies.

The sum of 1988-89 state tourism development budgets for the 50 states rose over 9 percent compared to the 1987-88 budget total of $291 million, which was a 19 percent increase over 1986-87 spending levels.

"Overall, state travel offices have enjoyed healthy increases in annual travel promotion budgets over the past five years," reported Data Center Director Dr. Suzanne Cook. "More and more, state governments are recognizing the significant contribution of tourism to their states' economic development."

New York maintained its number one ranking, allocating $24.3 million for travel development, followed closely by Illinois, with a total budget of $23.9 million.

Thirty states posted budget increases for the current year. The average state travel development budget reached $6.3 million, an increase of more than $500,000 over 1987-88's record $5.8 million.

Illinois reported the largest increase, $3.4 million, while four states projected increases of over $2 million each, including Virginia, Oklahoma, Arizona and Pennsylvania.

Iowa showed the largest percentage gain (139 percent), increasing its budget from $1.4 million to $3.4 million, with over a five-fold increase in its advertising budget.

States will spend an average $2.4 million on advertising, an 8.5 percent increase over reported advertising allocation for 1987-88. Advertising represents 39 percent of total state travel office expenditures.

The 1988-89 Survey of State Travel Offices will be sent to Data Center members and is available to others for $75, prepaid, by writing to the US Travel Data Center, 1133 21st Street NW, Washington, D.C. 20036. ##

1988 Summer Vacation Travel Rises 9 Percent

1988 summer vacation travel increased a surprising 9 percent over 1987 levels, according to the Data Center's National Travel Survey. During their travels, Americans covered more than 311 billion miles.

June, July and August, racking up over 320 million person-trips and far exceeding predictions made by the Data Center last May, proved to be the most traveled summer on record. (A person-trip is one person traveling 100 miles or more away from home.)

"The size of this increase exceeds all expectations," said Data Center Director Dr. Suzanne Cook. "Although consumer optimism, low unemployment and stabilized (continued on page 3)

Declining Lodging Prices Spur November Travel Cost Decrease

The overall cost of travel in the U.S. has dropped for a third straight month due to a significant decrease in the cost of lodging during November, according to the latest Travel Price Index (TPI).

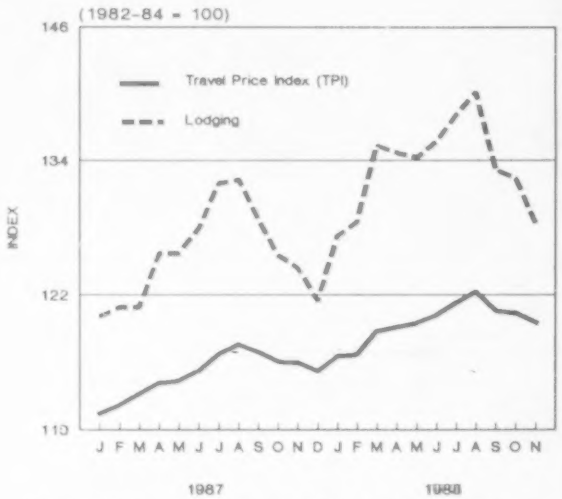
The TPI, which measures changes in the seasonally unadjusted prices of lodging, food, transportation and other goods and services purchased by Americans traveling away from home in the U.S., fell 0.7 percent to 119.5 (1982-84=100) in November.

For comparison, overall goods and services costs, as measured by the Consumer Price Index (CPI), increased 0.1 percent in November.

Motor fuel costs declined 0.1 percent in the monthly comparisons; however, air fares rose 1.1 percent, causing the overall price of transportation to increase 0.4 percent in November.

Entertainment costs declined 0.7 percent while the price of food and beverages purchased while away from home showed a slight increase, as did intracity and intercity public transportation.

The November TPI rose 3 percent over the same month in 1987. The CPI gained 4.2 percent for the same period. ##



Note: TPI revised January, 1987; Data not strictly comparable with earlier years.
Source: US Travel Data Center based on U.S. Bureau of Labor Statistics Data.

Monthly and Annual Rates of Change in the Travel Price Index and Components

November 1988 TPI Component	Monthly Percent Change October 1988 to November 1988	Annual Percent Change November 1987 to November 1988
Transportation	0.4	-0.2
Airline Fares	1.1	2.0
Other Intercity Trans.	0.6	6.1
Intracity Public Trans.	0.2	3.1
Motor Fuel	-0.1	-2.0
Lodging	-3.1	3.1
Food and Beverages Away From Home	0.2	4.4
Entertainment	-0.8	2.8
TRAVEL PRICE INDEX	-0.7	3.0
CONSUMER PRICE INDEX	0.1	4.2

Source: US Travel Data Center and U.S. Bureau of Labor Statistics

TRAVEL PRINTOUT is published monthly by the US Travel Data Center, the national non-profit center for travel and tourism research, and an affiliate of Travel Industry Association of America, Two Lafayette Centre, 1133 21st Street NW, Washington, D.C. 20036. Telephone: 202/293-1040. Suzanne D. Cook, Director. Ida Simmons, Editor. Julie Bowers, Assistant Editor.

Travel Printout reports on Data Center Projects, national travel research conducted by other respected organizations, and trends in the U.S. travel industry. Subscriptions are $70 per year, U.S., Canada and Mexico; other foreign countries, $80 per year, payable in U.S. funds only. ISSN: 0744-6233.

Summer travel
(continued from page 1)

lodging and gasoline prices were contributing factors, the size and scope of the increase in summer vacation travel over the previous year suggest that American consumers are beginning to choose travel over other goods and services. More than ever, Americans are feeling the need to vacation, and they are doing so, even if it means they have to forego other purchases in order to do so."

As the Data Center predicted, July 1988, for the second consecutive year, proved to be the most popular summer month for vacation travel. July garnered nearly 40 percent of total summer vacations.

The average duration of summer vacation trips remained at 6 nights per trip; however, total nights spent away from home on vacation exceeded 1.9 billion for summer 1988. The average round-trip distance jumped from 880 miles in summer 1987 to 970 miles this past summer.

Eighty-one percent of summer vacationers traveled by auto, truck or RV, while 16 percent traveled by air. Forty-two percent of vacationers stayed in hotels; 41 percent stayed with friends and relatives.

The South Atlantic/East South Central region attracted the largest share of summer visitors, along with the Mountain/Pacific regions. ##

Travel Review Conference Coming in February

The third annual Travel Review Conference will take place on February 23, 1989, at the Grand Hyatt Hotel in Washington, D.C.

The conference will again analyze and interpret emerging travel data for 1988 and its implications for the years ahead.

Participants will learn how the drought, forest fires, pollution, and the election affected the travel industry. Speakers will examine 1988 domestic and international travel sectors, leisure travel markets, transportation, accommodations, adventure and senior travel. From this information, the conference will provide a guide to formulate travel marketing plans and strategies for the future.

This year's conference is jointly sponsored by the U.S. Travel and Tourism Administration (USTTA), the Travel and Tourism Research Association (TTRA), and the US Travel Data Center. It will take place following USTTA's International Marketing Conference, and other travel-related events scheduled for the week.

For more information contact Mari Lou Wood, TTRA, at 801/581-3351 or Vernon Azucenas, 202/293-1040. ##

Immediately following the Travel Review Conference, the Data Center's annual membership meeting, usually held in October, will take place in the Lafayette Room of the Grand Hyatt Hotel.

Participants Praise 1989 Travel Outlook Forum

Survey participants rated the overall value of the US Travel Data Center's 1989 Travel Outlook Forum, co-sponsored by the Travel and Tourism Research Association (TTRA), an average of 4.0 (on a scale of 1 to 5) for this year's forum presentations. Seventy-six percent of the respondents rated the forum a 4 or 5.

When rated for overall value by session, 1988 Trends in Travel, by Data Center Director, Dr. Suzanne Cook, again earned the highest rating with a 4.12 average. Following closely were Dr. Steve Malin's Outlook for the Economy in 1989 (4.05), and the 1989 Outlook for International Travel (3.97) by Don Wynegar of the U.S. Travel and Tourism Administration.

The 1989 Outlook for Travel and Tourism contains the complete edited proceedings of this year's forum. This report, sent to all Data Center and TTRA members, is available to others for $100, prepaid, from the US Travel Data Center, 1133 21st Street NW, Washington, D.C. 20036. ##

Data Center Hosts Meeting of Hotel Marketers

US Travel Data Center hosted a meeting of hotel industry marketing research leaders in early December to determine how the Data Center's research program can most effectively address the research needs of the lodging industry and to consider development of other relevant research.

Data Center Director, Dr. Suzanne Cook was positive about the outcome of the meeting. "The delegates were very interested in pursuing common research interests and alternative methods for cost-effective research programs which would benefit the entire lodging industry," said Cook following the meeting.

Hotels represented at the meeting included Best Western International, Hilton Hotel Corporation, Holiday Corporation, Motel 6, Quality Inns International, Ramada Inn, Inc. and VMS Realty Partners. ##

Dr. Fleming Joins Data Center as Economic Research Manager

The Data Center is pleased to announce Dr. William Fleming as its new Manager of Economic Studies, replacing Nancy Mina.

Most recently, Fleming was an associate of Plantec Corporation where he directed market analysis projects. Fleming also worked for the Bureau of Economic Analysis at the Florida Department of Commerce where he conducted several tourism-related projects.

Among other scheduled projects, Fleming will work extensively with the rest of the economic staff on revisions to the Data Center's Travel Economic Impact Model. ##

1989 SATW Membership Directory Published

The Society of American Travel Writers (SATW) official 1989 membership directory will be available for purchase in March.

Containing more than 500 names of active travel writers and editors, the directory is a useful resource for public relations and marketing professionals and those in the travel industry who need to contact travel journalists and travel industry marketers.

The directory is divided into two main sections, active and associate members, as well as editors by affiliation, writers by specialties and members by affiliation and state.

The 1989 SATW Membership Directory is available for $75.00 by writing: SATW, Department A, 1100 17th Street., Suite 1000, NW, Washington, D.C. 20036. ##

Research Worth Writing For. . .

As a new addition in 1989, Travel Printout will include a "Research Worth Writing For" column to give added exposure to travel-related research projects. This new feature will appear every other month throughout the year. If you would like to have your company's travel research projects mentioned in future editions of Travel Printout, please send a brief description of the report, including price, address and contact name, to Julie Bowers, US Travel Data Center, 1133 21st Street NW, Washington, D.C. 20036.

* Travel and Leisure's recent publication, World Travel Overview 1988/89, its 13th annual review of the travel industry, examines worldwide travel trends in 1987.

Highlights include worldwide markets, international travel to and from the U.S., the caribbean region and atlantic islands, the U.S. travel industry, and U.S. travel characteristics and expenditures.

World Travel Overview costs $95 and may be ordered by writing to Louis Benincasa, Travel & Leisure, 1120 Avenue of the Americas, New York, NY 10036. ##

* The American Hotel & Motel Association (AH&MA) has published a Digest of Current Lodging Industry Market Research Studies, Volume III, through the AH&MA Research Foundation.

The digest summarizes the findings of 33 research studies highlighting useful information relevant to lodging market operators. Nine subjects are addressed: factors influencing hotel selection; who makes the reservation; lead time in making reservations; how reservations are made; average length of stay; how much is spent during a trip; effectiveness of media and promotions; and security.

Copies of this publication are available to AH&MA members for $20, non-members $30, from the Publications Dept., AH&MA, 1201 New York Ave., NW, Washington, DC 20005. ##

Visitor Volume at National Parks

Region	OCT 1988 visits	Change from OCT 1987* (percent)	Percent change 1988/1987* Year-to-Date
NEW ENGLAND	1,619,185	18	2
MIDDLE ATLANTIC	2,442,371	-13	-16
SOUTH ATLANTIC	8,943,442	-20	-4
EAST SOUTH CENTRAL	2,009,482	-15	8
EAST NORTH CENTRAL	455,834	20	13
WEST NORTH CENTRAL	547,299	6	4
WEST SOUTH CENTRAL	757,541	4	3
MOUNTAIN	3,136,164	10	3
PACIFIC	3,824,493	-5	0
TOTAL	23,735,811	-10	-2

* Percent change figures may not be consistent with those previously reported due to National Park Service revisions.

States comprising the Census regions:
New England: Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont. **Middle Atlantic:** New Jersey, New York, Pennsylvania. **South Atlantic:** Delaware, District of Columbia, Florida, Georgia, Maryland, North Carolina, South Carolina, Virginia, West Virginia. **East South Central:** Alabama, Kentucky, Mississippi, Tennessee. **East North Central:** Illinois, Indiana, Michigan, Ohio, Wisconsin. **West North Central:** Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota, South Dakota. **West South Central:** Arkansas, Louisiana, Oklahoma, Texas. **Mountain:** Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, Wyoming. **Pacific:** Alaska, California, Hawaii, Oregon, Washington.

Current Travel Indicators

CURRENT TRAVEL INDICATORS

	Current Month	Current Value	Percent Change: Previous Month	Percent Change: Year Ago Month	Percent Change: Year to Date
Establishments Receipts or Retail Sales					
Hotels, motels and other lodging places(1)	Oct	$ 4,970 million	11.8	9.3	8.6
Eating and Drinking Places(2)	Oct	13,437 million	0.5	8.8	5.6
Gasoline Service Stations(2)	Oct	9,075 million	0.4	3.1	4.5
Commercial Lodging Demand					
Hotel Motel Occupancy Rates(3)	Oct	62.7 percent	0.5	0.3	0.4
Real Demand for Commercial Lodging(4)	Oct	63.7 million	8.7	4.2	4.4
Airline Passenger Traffic(5)					
Domestic Revenue Passenger Miles	Oct	26.5 billion	8.4	5.6	0.6
International Revenue Passenger Miles	Oct	8.0 billion	5.2	17.8	17.7
Highway Traffic Volume(6)					
Rural Arterial Passenger Miles	Oct	43.5 billion	1.4	5.4	1.9
Rail Passenger Traffic(7)					
Amtrak Passenger Miles	Oct	440.1 million	2.8	0.5	7.4
Travel Price Index(1982-84=100) (8)	Oct	120.4	0.2	3.7	4.1
U.S. Resident Travel					
Total Person Trips(9)	Oct	39.2 million	8.0	5.5	1.1
Vacation Person Trips(9)	Oct	63.3 million	8.3	6.9	8.5
Total Person Nights(10)	Oct	366.8 million	22.1	12.5	3.6
Vacation Person Nights(10)	Oct	262.1 million	24.6	5.9	0.5
Public Use of National Parks(11)					
Visits	Oct	23,745,811	12.1	7.1	2.7
Overnight Stays	Oct	1,194,437	33.5	4.9	-1.0
Foreign Arrivals In the U.S.					
From Overseas(12)	Aug	1,394,920	11.6	11.9	20.3
	Sep	1,153,984	17.3	21.3	20.4
From Canada(13)	Oct	1,101,624	6.2	16.4	10.4
From Mexico(12)	Aug	151,874	12.9	13.5	9.8
	Sep	85,708	25.0	20.7	10.9
U.S. Citizen Departures					
To Overseas(12)	Sep	1,237,599	15.4	6.1	5.7
To Canada(13)	Oct	850,769	40.1	3.1	0.4
Domestic Demand for Motor Gasoline(14)					
Barrels per Day	Oct	7,442	1.3	2.1	2.0

(1) Source: Smith Travel Research, seasonally unadjusted. (2) Preliminary; revised monthly. Source: Bureau of the Census. (3) Source: Smith Travel Research, seasonally adjusted, 1986 and 1987 data have been revised. (4) Smith Travel Research, unadjusted room nights sold. (5) Preliminary; U.S. scheduled service air carriers. Source: Air Transport Association. (6) Preliminary; revised monthly. Source: Federal Highway Administration. (7) Source: National Railroad Passenger Corporation (Amtrak). (8) Source: US Travel Data Center and Bureau of Labor Statistics. (9) Source: US Travel Data Center. (10) US Travel Data Center. Data is not comparable to earlier published numbers due to revised methodology. (11) Preliminary; unadjusted for differences in reporting units. Source: National Park Service. (12) Source: U.S. Travel and Tourism Administration. Mexican data reflect 1% arrivals only. (13) Statistics Canada. (14) Preliminary; Source: U.S. Department of Energy.

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Research News for the U.S. Travel Industry

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Research News for the U.S. Travel Industry

TRAVEL PRINTOUT

US Travel Data Center

February 1989 Volume 18, Number 2

1989 Consumer Prices Expected to Rise Faster Than Travel Prices

1989 travel prices are expected to rise significantly slower than overall consumer prices for the year, reports the Data Center's 1988-89 Economic Review of Travel in America. For the first time, this newly-released report provides predictions for the economic implications of U.S. travel through 1989 in addition to its historical analysis of the role of travel activity and the industry in the U.S. economy.

Also forecast, the 1989 Travel Price Index (TPI), which measures the overall cost of travel and is comparable to the Consumer Price Index, will increase just 3.5 percent as a drop in gasoline prices offsets accelerating air fares, bus fares, and food service costs. Hotel and motel rates will increase slower than in 1988 as over-building encourages price competition in many areas. Yet, the costs of food and beverages away from home are expected to rise more rapidly in response to the drought of 1988.

According to the report, the United States' dynamic economic expansion will slow in 1989, but a recession appears unlikely. Interestingly, these economic developments foreseen in 1989 will not hinder the growth of travel, but neither will they boost increases above the current trend.

A projected 7 percent rise in personal income, coupled with a predicted increase in overall consumer spending, should prove positive for the travel industry in 1989. Consumers are likely to spend more on travel as income rises faster than both travel and overall prices.

For 1989, travel industry sales are expected to increase almost 7 percent, less than the 7.9 percent growth experienced in 1988, and short of the expected 7.2 percent growth in the gross national product. Real travel industry sales increased 2.9 percent a year over the past decade. (continued on page 4)

Congress Approves Funds for TEIM Revisions

Funds were recently appropriated by the U.S. Congress to support revisions and expansion of the Data Center's Travel Economic Impact Model (TEIM), a statistical model that provides annual estimates of travel-generated spending and its impact on national, state, and local economies.

The federal funding for this project, $150,000, will be included in the budget of the U.S. Travel and Tourism Administration, and earmarked for the TEIM revisions by the Data Center.

TEIM revisions include new multiplier, foreign visitor impact and forecasting components, allowing increased flexibility. These revisions will also complement more local and specific research studies undertaken by universities. (continued on page 2)

1988 Travel Costs Kept Pace With Overall Consumer Spending

In 1988, the overall Travel Price Index increased 4 percent over the previous year, approximately the same rate as the Consumer Price Index (CPI), which measures changes in the average cost of all items consumers purchase.

However, this increase was considerably less than the ten-year TPI growth rate of 7 percent, and less than a 6 percent increase in the CPI for the same period.

The annual average of the TPI, which measures changes in the seasonally unadjusted prices of lodging, food, transportation and other goods and services purchased by Americans traveling away from home in the U.S., was 119.5 (1982 - 84=100) in 1988.

The overall cost of travel increased substantially less than personal income growth in 1988.

The cost of lodging led all other components with a 5.7 percent increase in 1988. Entertainment followed with a 5.5 percent gain. Yet, airline fares, motor fuel prices, and intracity transportation expenses were also moderating influences on the 1988 TPI.

All components increased at a slower percentage rate than the long-term trends, with air fares and intracity public transportation showing the greatest moderation.

December 1988 travel prices stabilized as most components of the TPI showed little or no change.

The December TPI fell less than 1 percent from November to 119.4. For comparison, the CPI increased 0.2 percent.

Lodging, motor fuel and overall transportation costs measured slight decreases (less than 1 percent), while air fares, entertainment and intercity public transportation all showed minor increases.

TEIM (continued from page 1)

Further details on technical revisions to the TEIM will be featured in the March Travel Printout.

Travel Price Index and Components

December 1988 TPI Component	Monthly Percent Change November 1988 to December 1988	Annual Percent Change December 1987 to December 1988
Transportation	-0.3	0.3
Airline Fares	1.3	3.3
Other Intercity Trans.	1.3	7.1
Intracity Public Trans.	0.2	3.0
Motor Fuel	-1.5	-2.1
Lodging	-1.0	4.5
Food and Beverages Away From Home	0.3	4.4
Entertainment	1.1	4.1
TRAVEL PRICE INDEX	-0.1	3.7
CONSUMER PRICE INDEX	0.2	4.4

Source: US Travel Data Center and the U.S. Bureau of Labor Statistics

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Survey Prompts New Member Services

The Outlook for Travel and Tourism is the most popular and widely-used Data Center publication, followed closely by the annual National Travel Survey series, according to a recent Data Center membership survey.

Almost 1 in 5 members surveyed indicated that Travel Printout is even more important to them than the regularly scheduled reports.

Members also said that they had less time to read detailed reports and preferred to see the Data Center's findings in summarized forms. They often requested more in-depth information by telephone or fax.

When asked about new services, members offered several ideas such as having Data Center research staff available to speak at meetings, and research audits by the Data Center of an organization's existing research programs. Audits would include recommendations for establishing effective marketing intelligence gathering.

A "clearinghouse" type listing of travel-related research projects was another common suggestion. The Data Center is now gathering such information through a new, bi-monthly Travel Printout clearinghouse column and through assistance from the Georgetown University travel and tourism program.

Also, in response to the survey, orientation seminars will be held to better acquaint new members with the services and staff of the Data Center.

1988 Full Year NTS Results Coming in March

The 1988 seasonal results of the National Travel Survey, with separate reports on travel activity for all four seasons, premier in March.

Each report consists of two companion volumes: a Seasonal Travel Executive Briefing, a heavily condensed version of the surveys findings into concise analysis, and Seasonal Travel Market Close-Up for more detailed statistics.

The 1988 Travel Executive Briefing and Market Close-up, coming in April, contains a complete overview of Americans' travel in 1988, but data are not separated by season.

All of these 1988 reports will be sent to Data Center members. The National Travel Survey Seasonal Executive Briefing and Market Close-Up reports are available to others for $135 for both. The 1988 Travel Executive Briefing and Market Close-Up cost $135 separately or $250 for both. Write to: US Travel Data Center, Two Lafayette Centre, 1133 21st Street, NW, Washington, D.C. 20036.

TravelTab '89 Ready for National Tourism Week

The Data Center's 1989 TravelTab, a six-panel brochure containing the most up-to-date travel trends and statistics, will be released in mid-April in time for travel industry organizations to use when preparing campaigns for National Tourism Week, May 15-19.

TravelTab collects the most important summary data on travel by U.S. residents, impact on the economy, trends in travel prices, inbound and outbound foreign travel and more. It is designed as an easy reference source when writing speeches, articles and reports on travel.

As an added feature to this

(continued on page 4)

(continued from page 3)
year's edition, a space on the front panel is provided for printing of a company logo or emblem.

TravelTab is available in bulk orders (First 100 copies, $30; over 100, $25 per 100) or individually for $9 each from the US Travel Data Center, Two Lafayette Centre, 1133 21 St., NW, Washington, D.C. 20036.

Hunt Elected New Data Center Chairman

During its December 5 meeting, the Data Center's board of trustees elected new members and officers for 1989. Dr. John D. Hunt, distinguished professor of tourism from the University of Massachusetts, will serve as the 1989 chairman.

With the exception of Hunt, the other Data Center officers will remain the same as 1988:

- Vice-chairman, William D. Toohey, president, Travel Industry Association of America,
- Secretary, Dr. Charles R. Goeldner, director, business research division, University of Colorado,
- Treasurer, David J. Humphreys, president, Recreational Vehicle Industry Association.
- Executive Committee Member, Jerry Foster, president, Saga International Holidays.

The board also elected a new member, James Prosser, national marketing manager, tourism, AT&T, to a two-year term.

Other board members include: C. Reath Edwards, director of corporate marketing, Hershey Entertainment & Resort Company; Robert E. Gall, vice president, sales & advertising, Amtrak; Kenneth F. Hine, executive vice president, American Hotel & Motel Association; J. Phillip Keene, executive director, California Tourism Corporation; Peter W. Mason, travel category manager, Better Homes & Gardens; Patrick A. McMahon, director, Virginia Division of Tourism; Marshall E. Murdaugh, president, New York Convention & Visitors Bureau; Nestor N. Pylypec, vice president, Traffic Services, Air Transport Association of America; Rossi Ralenkotter, director of marketing, Las Vegas Convention & Visitors Authority; Henry R. Todd, director, Minnesota Office of Tourism; and Barbara Wickliffe, marketing research director, Best Western International.

Economic Review (continued from page 1)

Reviewing 1988 figures, the Economic Review reports that U.S. residents and foreign travelers spent $313 billion in the United States during 1988, an 8 percent increase over 1987 spending. These expenditures represent 6.4 percent of the gross national product.

Travel spending in America directly generated 5.5 million jobs in 1988, paying $70 billion in wages and salaries and producing nearly $37 billion in federal, state and local taxes.

If viewed as a single retail industry, the travel and tourism sector is the third largest retail industry in business receipts, following automotive dealers and food stores.

The 1988-89 Economic Review of Travel in America will be sent to Data Center members and is available to others for $60 by writing to the US Travel Data Center, Two Lafayette Centre, 1133 21st Street, NW, Washington, D.C. 20036.

Travel Volume Increases for October & November

During October, travel by Americans rose 5.5 percent from year-earlier levels, reported the latest National Travel Survey conducted by the Data Center.

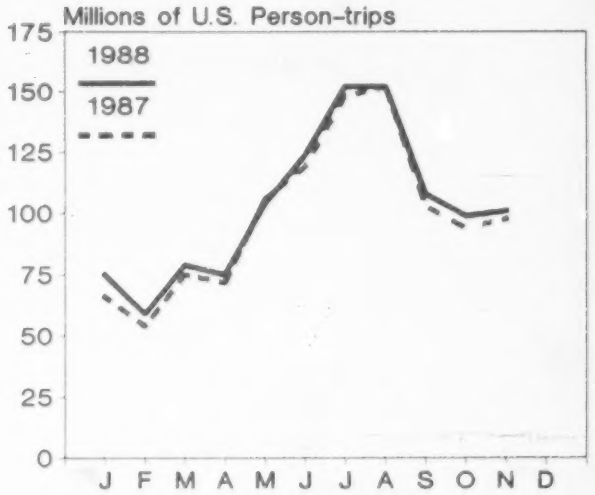
The monthly telephone survey showed that Americans took over 99 million person-trips in October. (A person-trip is one person traveling 100 miles or more away from home.)

Other survey findings include:

- Vacation and weekend travel continued to show significant gains, increasing 7 percent and 9 percent respectively during October.
- Pleasure travel rose 7 percent, while business travel remained unchanged compared to October 1987.
- Auto travel showed a 12 percent increase during October, and hotel/motel use rose 2 percent.
- The average round-trip distance fell to 940 miles, down from 980 miles in October 1987. Average trip duration was 3.7 nights.

November travel volume rose 4 percent, garnering 101 million person-trips.

- Again, vacation travel showed a strong increase, up 8 percent from November 1987.
- Pleasure travel rose 6 percent, and weekend travel edged 1 percent.
- Auto travel, while slowing in growth, still registered a 4 percent gain in November.
- Average round-trip distance was 960 miles. Average trip duration was 3.4 nights.



Source: US Travel Data Center's National Travel Survey

Visitor Volume at National Parks

Region	NOV 1988 visits	Change from NOV 1987*	Year-to-Date 1988/1987*
NEW ENGLAND	703,996	0%	2%
MIDDLE ATLANTIC	1,579,036	-13	-16
SOUTH ATLANTIC	5,447,573	-7	-4
EAST SOUTH CENTRAL	1,491,150	-2	7
EAST NORTH CENTRAL	174,966	-18	12
WEST NORTH CENTRAL	335,071	18	4
WEST SOUTH CENTRAL	540,618	4	3
MOUNTAIN	1,758,124	13	3
PACIFIC	2,688,162	-10	-1
TOTAL	14,718,696	-5	-2

* Percent change figures may not be consistent with those previously reported due to National Park Service revisions.

States comprising the Census regions:
New England: Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont. **Middle Atlantic:** New Jersey, New York, Pennsylvania. **South Atlantic:** Delaware, District of Columbia, Florida, Georgia, Maryland, North Carolina, South Carolina, Virginia, West Virginia. **East South Central:** Alabama, Kentucky, Mississippi, Tennessee. **East North Central:** Illinois, Indiana, Michigan, Ohio, Wisconsin. **West North Central:** Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota, South Dakota. **West South Central:** Arkansas, Louisiana, Oklahoma, Texas. **Mountain:** Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, Wyoming. **Pacific:** Alaska, California, Hawaii, Oregon, Washington.

6

Current Travel Indicators

CURRENT TRAVEL INDICATORS

	Current Month 1988	Current Value	Percent Change: Previous Month	Percent Change: Year-Ago Month	Percent Change: Year to Date
Establishments Receipts or Retail Sales					
Hotels, motels and other lodging places(1)	Nov	$ 4,236 million	14.8	8.4	8.9
Eating and Drinking Places(2)	Nov	13,569 million	1.0	7.7	5.8
Gasoline Service Stations(2)	Nov	8,951 million	-1.4	2.2	4.3
Commerciad Lodging Demand					
Hotel/Motel Occupancy Rates(3)	Nov	62.5 percent	-0.3	0.5	1.3
Real Demand for Commercial Lodging(4)	Nov	54.1 million	-15.0	5.4	4.8
Airline Passenger Traffic(5)					
Domestic Revenue Passenger Miles	Nov	25.0 billion	-5.7	6.1	1.1
International Revenue Passenger Miles	Nov	6.5 billion	-18.6	18.3	17.8
Highway Traffic Volume(6)					
Rural Arterial Passenger Miles	Nov	40.1 billion	-7.8	4.8	4.9
Rail Passenger Traffic(7)					
Amtrak Passenger Miles	Nov	439.1 million	0.3	2.6	7.0
Travel Price Index(1982-84=100) (8)	Nov	119.5	-0.7	3.0	4.0
U.S. Resident Travel					
Total Person Trips(9)	Nov	101.2 million	2.0	3.8	4.1
Vacation Person Trips(9)	Nov	69.4 million	9.6	7.8	8.5
Total Person Nights(10)	Nov	343.8 million	-6.3	-5.6	-3.7
Vacation Person Nights(10)	Nov	252.2 million	-3.8	5.1	-0.2
Public Use of National Parks(11)					
Visits	Nov	14,718,696	-38.0	5.0	-2.0
Overnight Stays	Nov	630,934	-47.2	14.0	0.0
Foreign Arrivals to the U.S.					
From Overseas(12)	Oct	1,060,027	8.1	31.8	21.5
From Canada(13)	Nov	892,125	-19.0	18.5	10.9
From Mexico(12)	Oct	89,846	4.8	35.8	13.0
U.S. Citizen Departures					
To Overseas(12)	Sep*	1,237,599	-15.4	6.1	5.7
To Canada(13)	Nov	573,803	-32.6	10.8	0.0
Domestic Demand for Motor Gasoline(14)					
Barrels per Day	Nov	7,322 thousands	1.6	2.4	2.0

* October data not yet available

(1) Source: Smith Travel Research, seasonally unadjusted. (2) Preliminary; revised monthly. Source: Bureau of the Census. (3) Source: Smith Travel Research, seasonally adjusted, 1986 and 1987 data have been revised. (4) Smith Travel Research; unadjusted room nights sold. (5) Preliminary; U.S. scheduled service air carriers. Source: Air Transport Association. (6) Preliminary; revised monthly. Source: Federal Highway Administration. (7) Source: National Railroad Passenger Corporation (Amtrak). (8) Source: US Travel Data Center and Bureau of Labor Statistics. (9) Source: US Travel Data Center. (10) US Travel Data Center. Data is not comparable to earlier published numbers due to revised methodology. (11) Preliminary; unadjusted for differences in reporting units. Source: National Park Service. (12) Source: U.S. Travel and Tourism Administration. Mexican data reflect I94 arrivals only. (13) Statistics Canada. (14) Preliminary; Source: U.S. Department of Energy.

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TRAVEL PRINTOUT
Research News for the U.S. Travel Industry

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Research News for the U.S. Travel Industry

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TRAVEL PRINTOUT

US Travel Data Center

March 1989 Volume 18, Number 3

Travel Industry Prospers Despite "Crash"

"The travel industry turned out a more positive performance than originally expected in the year following Black Monday -- October 19, 1987, when the Dow took a 508-point drop and led people to wonder if the fear and panic on Wall Street would spread to Main Street," reported US Travel Data Center Director Dr. Suzanne Cook at the Third Annual Travel Review Conference in Washington, D.C. The following statistics from Cook's speech, "1988 Domestic Travel in Review," illustrate the resilience of the travel industry in the wake of what could have resulted in widespread misfortune:

- Travel industry sales increased 7.9 percent in 1988, more rapidly than did nominal gross national product (GNP), which posted the highest growth rate since 1984 -- 7.4 percent. In fact, travel industry sales have increased faster than GNP during seven of the past ten years.
- The relationship between travel prices and personal income improved in 1988. Consumers' purchasing power nearly doubled as personal income rose 7.5 percent while the Travel Price Index increased only 4 percent.
- Travel industry employment rose 4.6 percent over 1987. In 1988, the travel industry was responsible for more than 11 percent of all the additional jobs created in the entire U.S. economy, generating 5.5 million jobs.
- The transportation sector of the industry also showed renewed strength in 1988. Last year, Americans traveled nearly 1.5 trillion passenger-miles on trips away from home on the nation's highways, railways and skyways.
- However, 1988 brought some major shifts in transportation growth. For the first time since 1981, personal motor vehicle travel (including automobiles, trucks, and recreational vehicles) outpaced common carriers (air, bus, and rail), increasing nearly 5 percent in 1988.
- The nation's air carriers posted a 3.8 percent gain in domestic passenger-miles, as capacity limitations and higher, more restrictive fares restrained the growth in traffic. The airlines did, however, enjoy a 23 percent gain in operating profits over 1987.
- Amtrak passenger-miles rose 9 percent to lead all modes in growth for 1988. Also, the intercity bus industry continued to show passenger gains after several years of decline.

These 1988 figures and more, as presented by Dr. Suzanne Cook and Lenore Reid, manager of Survey Research, at the Travel Review Conference, are available as a slide show to present to **your own audience**. Data Center members pay $150; nonmembers $375. Write to the US Travel Data Center, 1133 21st Street N.W., Washington, D.C. 20036, or call 202/293-1040.

The complete edited proceedings of the Travel Review Conference are available for $45 by writing to the Travel and Tourism Research Association, c/o Mari Lou Wood, University of Utah, Bureau of Economic and Business Research, P.O. Box 58066, Foothill Station, Salt Lake City, Utah 84158. ##

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January Travel Registers Slight Price Increase

The slight gain in the overall cost of travel reported during January was the result of two offsetting factors -- an increase in lodging prices and a decline in motor fuel costs, reported the Data Center's latest Travel Price Index (TPI).

The TPI, which measures changes in the seasonally unadjusted prices of lodging, food, transportation and other goods and services purchased by Americans traveling away from home in the U.S. , reached 120.6 (1982 - 84 = 100) in January.

For comparison, overall goods and services costs, as measured by the Consumer Price Index (CPI), increased 0.5 percent to 121.1 in January.

A 2.4 percent increase in lodging prices during January is the largest gain since March 1988; however, motor fuel prices declined for the fifth consecutive month, keeping the overall rise in travel costs to a minimum.

Declining motor fuel costs also allowed the overall cost of transportation to drop 0.1 percent in January despite a 1 percent rise in airline fares.

The January TPI rose 3.4 percent over year-earlier levels; the CPI increased 4.7 percent for the same period.

The cost of other intercity transportation led the yearly increase in the TPI, rising 7.3 percent over January 1988 levels. Entertainment showed the second largest yearly increase, rising 5.2 percent, followed closely by airline fares, which gain 5 percent over the previous year. ##

Travel Price Index and Components

January 1989 TPI Component	Monthly % Change December 1988 to January 1989	Annual % Change January 1988 to January 1989
Transportation	-0.1	2.1
Airline Fares	1.0	5.0
Other Intercity Trans.	0.5	7.3
Intracity Public Trans.	0.0	2.6
Motor Fuel	-0.9	-0.1
Lodging	2.4	2.1
Food and Beverages Away From Home	0.5	4.6
Entertainment	1.9	5.2
TRAVEL PRICE INDEX	1.0	3.4
CONSUMER PRICE INDEX	0.5	4.7

Source: US Travel Data Center and the U.S. Bureau of Labor Statistics

BUCK, the Touri$t Dollar, the new trademark symbol of the National Travel and Tourism Awareness Council (NTTAC), debuted during Unity Week in Washington, D.C. The NTTAC uses Buck and information from the US Travel Data Center to convey the important role of travel and tourism in the U.S. economy to the American public. Buck is the featured leader of National Tourism Week, May 15-19, 1989. To learn more about the National Travel and Tourism Awareness Council and its programs, contact Dee Minic, Two Lafayette Centre, 1133 21st NW, Washington, D.C. 20036. ##

December Travel Shows Mild Decrease

December travel declined nearly 3 percent, the first decrease in overall travel volume in seven months. However, business travel, which has exhibited little change in recent months, showed a significant increase, according to the latest National Travel Survey (NTS) conducted by the US Travel Data Center.

This monthly telephone survey reports that Americans took 103 million person-trips in December 1988. (A person-trip measures one person traveling 100 miles or more away from home.)

The December NTS reports:

- Business travel increased more than 20 percent over year-earlier levels,
- Vacation travel decreased 5 percent,
- Pleasure travel fell 6 percent,
- Auto travel and air travel dropped below year-earlier levels.
- The average trip duration was 4.1 nights; average round-trip distance was 910 miles.

Through national probability samples of 1,500 adults each month, the survey's results are projectable to the entire adult population of the contiguous United States. ##

TRAVEL PRINTOUT is published monthly by the US Travel Data Center, the national non-profit center for travel and tourism research, and an affiliate of Travel Industry Association of America, Two Lafayette Center, 1133 21st Street NW, Washington, D.C. 20036. Telephone: 202/293-1040. Suzanne D. Cook, Director, Julie Bowers, Editor.

Travel Printout reports on Data Center Projects, national travel research conducted by other respected organizations, and trends in the U.S. travel industry. Subscriptions are $70 per year, U.S., Canada and Mexico; other foreign countries, $80 per year, payable in U.S. funds only. ISSN: 0744-6233.

TEIM Scheduled for Revision

The US Travel Data Center has launched a project to revise and expand the capabilities of its Travel Economic Impact Model (TEIM), the only national model which produces comparable and consistent estimates of the economic impact of travel at the state and local levels.

The Travel Economic Impact Model (TEIM) was developed in 1973 by the Data Center to generate detailed estimates of the impact of travel on national, state, local and city economies. Since then the model has been revised to incorporate additional travel spending and other information.

The complete revision/expansion process entails a re-examination of the TEIM's original coverage and assumptions, incorporation of improved input data, revision of the impact equations, improvements in the computer processing, and a revised series of estimates. In addition, new components will be added to permit greater flexibility while creating a wider audience for travel economic impact studies.

The TEIM revision project, made possible by a $150,000 contract with the U.S. Travel and Tourism Administration, and contributions from the National Coucil of State Travel Directors and the private sector, is headed by Dr. William Fleming, manager of Economic Research at the Data Center. Says Fleming, "It is essential that all businesses involved in the industry have reliable and timely data needed to make well-informed marketing and investment decisions. Federal, state, and local governments also must make policy decisions concerning the travel industry based on dependable data."

The scheduled TEIM revisions include counseling by several review panels throughout the revision process:

- An Industry Advisory Panel of travel industry leaders will guide the project.
- A Technical Review Panel will advise on modeling techniques and data sources.
- An Industry Review Panel of travel industry leaders across the country will review and comment on industry priorities for possible model output.

Upon completion of the TEIM revisions, three new model components will be developed and programmed for use in conjunction with the TEIM: (1) Multiplier Component, (2) Foreign Visitor Impact Component, (3) Forecasting Component.

The multiplier component will allow the Data Center to produce estimates of total (direct and indirect) statewide and local travel economic impact estimates. As part of this project, the Data Center will generate national multiplier estimates for U.S. resident and foreign visitor travel spending.

The foreign visitor impact component will estimate the impact of foreign visitor spending at the national and state level using data from the U.S. Travel and Tourism Administration's (USTTA) In-Flight Survey of International Air Travelers.

With the forecasting component, the Data Center will be able to provide projections of travel spending and impact at the state and national level for one to five years into the future. The Project Team will interview experts and consult with the technical review panel to determine the optimal methodology for such a component.

Each new component will be reviewed by all three panels, modified to specification, and re-tested.

The outcome of the TEIM revision/expansion will be a more effective and flexible tool for assessing the economic impact of travel and tourism on national, state and local economies. Those seeking further information on the Travel Economic Impact Model, contact Dr. William Fleming; 202/293-1040. ##

Region	DEC 1988 visits	% Change from DEC 1987*	% Change 1988/1987*
NEW ENGLAND	285,644	-3	2
MIDDLE ATLANTIC	1,189,705	-5	-16
SOUTH ATLANTIC	3,828,041	-22	-5
EAST SOUTH CENT.	1,328,107	15	8
EAST NORTH CENT.	173,019	29	12
WEST NORTH CENT.	204,248	14	4
WEST SOUTH CENT.	360,507	1	2
MOUNTAIN	1,120,092	4	3
PACIFIC	2,371,012	-3	-1
TOTAL	10,860,375	-8	-2

* Percent changes may not be consistent with prior figures due to National Park Service revisions.

States comprising the Census regions:
New England: Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont. **Middle Atlantic:** New Jersey, New York, Pennsylvania. **South Atlantic:** Delaware, District of Columbia, Florida, Georgia, Maryland, North Carolina, South Carolina, Virginia, West Virginia. **East South Central:** Alabama, Kentucky, Mississippi, Tennessee. **East North Central:** Illinois, Indiana, Michigan, Ohio, Wisconsin. **West North Central:** Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota, South Dakota. **West South Central:** Arkansas, Louisiana, Oklahoma, Texas. **Mountain:** Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, Wyoming. **Pacific:** Alaska, California, Hawaii, Oregon, Washington.

Current Travel Indicators

CURRENT TRAVEL INDICATORS

	Current Month 1988	Current Value	Percent Change: Previous Month	Percent Change: Year-Ago Month	Percent Change: Year to Date
Establishments Receipts or Retail Sales					
Hotels, motels and other lodging places(1)	Dec	$ 3,287 million	-22.4	7.2	8.9
Eating and Drinking Places(2)	Dec	13,823 million	1.1	8.1	6.1
Gasoline Service Stations(2)	Dec	9,100 million	1.0	4.8	4.4
Commercial Lodging Demand					
Hotel/Motel Occupancy Rates(3)	Dec	62.5 percent	0.0	1.3	1.5
Real Demand for Commercial Lodging(4)	Dec	44.2 million	-18.3	4.7	4.9
Airline Passenger Traffic(5)					
Domestic Revenue Passenger-Miles	Dec	25.3 billion	1.3	1.9	1.1
International Revenue Passenger-Miles	Dec	7.1 billion	8.6	18.3	17.8
Highway Traffic Volume(6)					
Rural Arterial Passenger-Miles	Dec	39.6 billion	-1.3	5.4	5.0
Rail Passenger Traffic(7)					
Amtrak Passenger-Miles	Dec	486.1 million	10.7	-1.1	6.3
Travel Price Index(1982-84=100) (8)	Dec	119.4	-0.1	3.7	4.0
U.S. Resident Travel					
Total Person-Trips(9)	Dec	103.4 million	2.2	-2.6	3.5
Vacation Person-Trips(9)	Dec	70.2 million	1.2	-5.0	7.2
Total Person-Nights(10)	Dec	423.9 million	23.3	-10.6	-4.3
Vacation Person-Nights(10)	Dec	354.2 million	40.4	-3.1	-0.4
Public Use of National Parks(11)					
Visits	Dec	10,860,375	-26.2	-8.0	-2.0
Overnight Stays	Dec	338,927	-46.3	0.0	0.0
Foreign Arrivals in the U.S.					
From Overseas(12)	Nov	n/a			
From Canada(13)	Dec	805,559	-9.5	24.1	11.6
From Mexico(12)	Nov	n/a			
U.S. Citizen Departures					
To Overseas(12)	Oct	n/a			
To Canada(13)	Dec	575,477	0.5	5.8	0.2
Domestic Demand for Motor Gasoline(14)					
Barrels per Day	Dec	7,344 thousand	-0.3	1.3	1.5

(1) Source: Smith Travel Research, seasonally unadjusted. (2) Preliminary; revised monthly. Source: Bureau of the Census. (3) Source: Smith Travel Research, seasonally adjusted, 1986 and 1987 data have been revised. (4) Smith Travel Research, unadjusted room nights sold. (5) Preliminary; U.S. scheduled service air carriers. Source: Air Transport Association. (6) Preliminary; revised monthly. Source: Federal Highway Administration. (7) Source: National Railroad Passenger Corporation (Amtrak). (8) Source: US Travel Data Center and Bureau of Labor Statistics. (9) Source: US Travel Data Center. (10) US Travel Data Center. Data is not comparable to earlier published numbers due to revised methodology. (11) Preliminary; unadjusted for differences in reporting units. Source: National Park Service. (12) Source: U.S. Travel and Tourism Administration. Mexican data reflect 194 arrivals only. (13) Statistics Canada (14) Preliminary; Source: U.S. Department of Energy.

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TRAVEL PRINTOUT
Research News for the U.S. Travel Industry

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Research News for the U.S. Travel Industry

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TRAVEL PRINTOUT

US Travel Data Center

April 1989 Volume 18, Number 4

U.S. Travel Up 4 Percent in 1988

Domestic travel increased 4 percent in 1988, reaching 1.23 billion person-trips, the fourth consecutive year of growth in the U.S. travel market.

However, while total travel rose in 1988, the number of nights spent away from home on trips dropped 4 percent -- a direct result of the continuing popularity of weekend and shorter vacation and pleasure travel. In fact, weekend and long weekend vacations increased nearly 11 percent last year.

Vacation travel, which rose more than 7 percent in 1988, enjoyed a banner year while accounting for 67 percent of total travel. In keeping with the overall trend toward shorter trips, the average duration of vacation trips dropped to 4.8 nights in 1988 compared to 5.7 nights in 1986 and 6.2 nights in 1983. Summer vacation travel posted exceptional growth over year-earlier levels, with July attracting the majority of vacationers for the second consecutive year.

1988 also brought some major shifts within the transportation sector. Personal motor vehicle travel (automobile, truck, or recreational vehicle) rose 7 percent in 1988, outpacing common carrier (air, bus, and rail) growth for the first time in six years. However, common carriers garnered 25 percent of all intercity passenger miles during 1988.

While nearly half of all domestic trips were taken by those aged 18 - 34, the 35 - 54 age group traveled nearly 9 percent more in 1988 than in the previous year. The 35 - 54 group, including the leading edge of the "baby boom," took 34 percent of all trips in the U.S., while the 55 and over group accounted for the remaining 18 percent of total travel.

The Northeast region of the country enjoyed a significant increase in visitors regionally, but attracted just 14 percent of all trips nationally. The Great Lakes and the Midwest regions drew 9 percent and 5 percent more travelers, respectively. Yet, the Southeast remained the most popular destination region, garnering one-quarter of all trips in 1988.

You can find these figures and other pertinent data in the **1988 Travel Executive Briefing**, a complete summary of the year's travel activity, and the **1988 Travel Market Close-Up**, a collection of data tabulations for more in-depth research. Together these reports detail the annual results of the Data Center's National Travel Survey.

To receive a copy of these reports, send $250 per set, or $135 if purchasing reports individually, to: US Travel Data Center, Two Lafayette Centre, 1133 21st Street, NW, Washington, D.C. 20036.

##

TravelTab Now Available

U.S. residents and foreign visitors spent $313 billion on travel in America in 1988, generating $302 billion in business receipts and $39 billion in taxes.

Travel spending directly supported more than 5.4 million jobs in the U.S. in 1988, generating nearly $70 billion in payroll income.

These estimates and other 1988 travel trends are contained in the Data Center's **1989 TravelTab**, a collection of important summary data (continued on page 4)

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1990 Travel Outlook Forum Agenda in the Works

"1990 -- Gateway to a Decade" will theme the US Travel Data Center's 1990 Travel Outlook Forum, co-sponsored by the Travel and Tourism Research Association, on October 3 at the Diplomat Hotel in Hollywood, Florida.

Forum speakers will focus on adjustments in the travel industry for the 1990s following a decade of mergers, acquisitions, and record performances.

Michael Durchin, managing director and airline analyst for Drexel Burnham Lambert Inc., will discuss the outlook for air travel at the forum.

Randy Smith, president of Smith Travel Research, will provide the 1990 lodging forecast on the outlook for hospitality panel.

William Johnston, vice president for special projects at the Hudson Institute, will present the Institute's Workforce 2000, a long range look at trends affecting work and workers in the late 20th century. For more information on the 1990 Travel Outlook Forum, contact the US Travel Data Center, 202/293-1040.

February Travel Prices Rise

February travel prices showed a sizeable increase, spurred mainly by a rise in lodging costs, according to the latest Travel Price Index (TPI) compiled by the Data Center.

The TPI, which measures changes in the seasonally unadjusted prices of lodging, food, transportation and other goods and services purchased by Americans traveling away from home in the U.S., reached 122.1 (1982 - 84 = 100) in February (see chart).

For comparison, overall goods and services costs in the U.S., as measured by the Consumer Price Index (CPI), increased slightly to 121.6 for the month.

The 3 percent rise in the cost of lodging while out of town in February was the second consecutive monthly increase following four months of decline.

Motor fuel costs and air fares rose, causing the overall cost of transportation to edge nearly 1 percent over the previous month. The costs of entertainment and food and beverages while traveling also showed increases, contributing to the overall increase in the February TPI.

The February TPI rose 4.6 percent over year-earlier levels, led by the 7 percent jump in air fares and other intercity public transportation. Entertainment costs rose 6 percent over February 1988, followed by a nearly 5 percent gain in the cost of food and beverages purchased while traveling. For comparison, the CPI rose 4.8 percent for the same period. ##

Travel Price Index and Components

TPI Component	Monthly % Change January 1989 to February 1989	Annual % Change February 1988 to February 1989
Transportation	0.8	4.5
Airline Fares	0.6	7.1
Other Intercity Trans.	0.2	6.8
Intracity Public Trans.	0.5	2.9
Motor Fuel	0.9	2.5
Lodging	3.0	4.2
Food and Beverages		
Away From Home	0.4	4.6
Entertainment	0.8	5.9
TRAVEL PRICE INDEX	1.2	4.6
CONSUMER PRICE INDEX	0.4	4.8

Source: US Travel Data Center and the U.S. Bureau of Labor Statistics

TEIM Update

The International Association of Convention and Visitor Bureaus (IACVB) is organizing a task force to work with the Data Center in updating and expanding the Travel Economic Impact Model (TEIM), the Data Center's statistical model which estimates the economic impact of travel on the nation's economy.

The IACVB task force will assist in identifying cities' research needs and relevant data sources to be included in the updated TEIM. With this input, the TEIM will be able to more accurately estimate the economic impact of travel at the local level in addition to its estimates of the effects of travel spending at the national and state level.

Other industry segments also have plans to join committees involved in the TEIM revision process. For more information about the TEIM, contact Dr. William Fleming at 202/293-1040.

TRAVEL PRINTOUT is published monthly by the US Travel Data Center, the national non-profit center for travel and tourism research, and an affiliate of Travel Industry Association of America, Two Lafayette Center, 1133 21st Street NW, Washington, D.C. 20036. Telephone: 202/293-1040. Suzanne D. Cook, Director, Julie Bowers, Editor.

Travel Printout reports on Data Center Projects, national travel research conducted by other respected organizations, and trends in the U.S. travel industry. Subscriptions are $70 per year, U.S., Canada and Mexico; other foreign countries, $80 per year, payable in U.S. funds only. ISSN: 0744-6233.

Director's Notes

commentary by
Suzanne D. Cook, Ph.D.

As an aid to readers who may be relatively unfamiliar with the technical aspects of survey research, the following provide some basic guidelines for conducting and evaluating travel surveys.*

* * * * * *

American consumers are protected by laws that enable them to determine what they are buying. Those who conduct or use survey research need a similar set of standards to assess the value of results provided.

Surveys are most useful when conducted on a "scientific" basis -- according to rigorous standards of survey design, conduct, processing, and analysis.

The following items delineate the major principles of sound survey research.

1. **Sample size.** The total sample size should be noted, including both respondents and non-respondents. The larger the sample, the smaller the resulting sampling error (see number 10), all other items being equal. A smaller sampling error means the estimates are statistically more precise, but says nothing about biases introduced by other factors that could render the survey results meaningless.

2. **Population definition.** The larger population that the sample is designed to represent should be explicitly stated. This may be, for example, "all travelers to places 100 miles or more away from home," or "all U.S. households." Be careful to determine that the sample does indeed represent the defined population. A sample of highway information center visitors does not represent all auto travelers, although it is sometimes assumed that it does.

3. **Sample selection method.** Identify how the sample was drawn from the population. This might be every fourth visitor to a highway information center, or any number of approaches. Random or probability samples are judged by statisticians to be superior to non probability samples such as "judgmental" or "quota" samples. Without this information, it cannot be determined whether the sample actually does represent the defined population.

4. **Interview location.** Where an interview is conducted can also help determine if the sample represents the designated population. For example, interviewing selected visitors at a group of attractions does not necessarily typify all travelers visiting the area.

5. **Interview schedule.** Travel is a very seasonal activity. Interviews conducted during one season generally do not represent travel patterns for the year. Moreover, because a respondent's ability to recall an event diminishes with time, a survey conducted once a year of all trips in the past 12 months will provide less reliable results than a survey conducted monthly.

6. **Interview mode.** Respondents can be contacted for interview in person, by telephone, or by mail. Each interview mode has its own limitations. For exarnple, visuals cannot be used during a phone interview, interviewer bias may arise in the personal mode, and low response rates and reporting lags plague mail surveys.

7. **Response rate.** In general, the higher the response rate, the more representative the survey will be of the defined population. A response rate that falls below 80 percent is cause for concern. Those 20 percent or more who did not respond may differ considerably in behavior and attitudes from those who did, which is exactly what the survey is designed to determine.

8. **Non-response reduction procedures.** It is important to know what procedures were used to reduce the problem of non-response, including monetary and other incentives. Reasonable efforts should be made to obtain completed interviews from all members of the sample drawn.

9. **Interview form or questionnaire.** The actual questionnaire should be included with the presentation of the survey results. This allows better interpretation of responses since there are many ways to ask the same question. Look particularly for "leading" questions that provoke the respondent to answer in a certain way.
(continued on page 4)

10. **Sampling error.** Since a sample is, by definition, only a subset of the population, a measure of how closely the estimates produced by the survey of that sample represent the population is needed. For example, when surveying travelers, there should be an indicator of how accurately the resulting estimates represent the actual number of travelers and their percentage distribution by age, income, and other characteristics. The sampling error of a survey estimate indicates how much a sample's estimates of volume or distribution may differ from the actual value of the population from which it is drawn.

As with any product, certain information should be gathered before deciding whether and how to use survey research results. Few people would purchase a car without knowing its cost, size, efficiency, reliability, model, and past performance record. It would be equally foolish to accept survey results without knowing the sample size, design, methodology, response rate, reliability, questions, and producer.

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* Based on an article by Dr. Douglas C. Frechtling, former director of the Data Center.

Increased Vacationing Spurs January Travel Increase

January travel rose 6 percent over year-earlier levels, led by a significant increase in vacation trips, reported the results of the latest National Travel Survey (NTS).

The monthly telephone survey showed that Americans took nearly 80 million person-trips during January. (A person-trip measures one person traveling 100 miles or more away from home.)

The largest increases for January appeared in vacation travel, which increased 18 percent, and auto travel, which rose 11 percent over the previous year.

The January NTS also reports:

- Pleasure travel increased 4 percent,
- Weekend travel decreased 6 percent,
- Business travel stabilized, and
- Hotel/motel use remained constant.

Through national probability samples of 1,500 adults each month, the NTS results are projectable to the entire adult population of the contiguous United States. For further information about the National Travel Survey, contact Lenore Reid, manager of survey research, at 202/293-1040.

TravelTab (continued from page 1)

on travel designed as a quick reference guide when writing speeches, articles, and reports on travel.

Also included in **TravelTab**:

- Foreign arrivals to the U.S. grew 14 percent to nearly 34 million.
- Spending by foreign visitors in the U.S. reached $18 billion, a 25 percent increase over 1987.
- More than 41 million Americans spent $23 billion while visiting foreign countries in 1988, a 13 percent spending increase over 1987.
- Approximately $294 billion was spent on domestic travel in 1988. One-quarter, or $75 billion, was spent on food alone.

TravelTab 1989 can be used as a give-away to members, customers, employees, and meeting attendees. This year's edition allows space on the cover to print your company's emblem or logo.

TravelTab 1989 is available in bulk orders of 100 or more (first 100 copies, $30; over 100, $25 per 100) or individually for $9 each: write: US Travel Data Center, 1133 21st, Washington, DC, 20036.##

Visitor Volume at National Parks

Region	JAN 1988 visits	% Change from JAN 1987*	% Change Yr-to-Date*
NEW ENGLAND	301,148	15	15
MIDDLE ATLANTIC	831,818	-9	-9
SOUTH ATLANTIC	4,123,704	25	25
EAST SOUTH CENT.	1,251,564	15	15
EAST NORTH CENT.	192,487	-12	-12
WEST NORTH CENT.	178,272	18	18
WEST SOUTH CENT.	440,709	28	28
MOUNTAIN	1,167,101	7	7
PACIFIC	2,693,726	12	12
TOTAL	11,180,529	14	14

* Percent changes may not be consistent with prior figures due to National Park Service revisions.

Discoveries...

An Ongoing Guide to Current Travel Research

● American Express World Travel News commissioned the **Psychology of Vacation Travel** survey, asking 1,000 adults nationwide to answer questions about their vacationing habits.

The study, which mainly covers vacation motivators and benefits, reveals:

- **The top ten reasons Americans go on vacation,** including " to be with family," "to be with spouse or companion," and "rest and relaxation."
- **Vacation travel is important to Americans.** More than 75 percent of the survey participants say that vacations are somewhat, very, or extremely important to them.

For further information about the "Psychology of Vacation Travel" survey, contact Jennifer Curtiss, American Express, 212/640-3216.

● A growing number of guests are using resort hotels for work, not play, according to a report by Laventhol & Horwath, **U.S. Resort Lodging Industry 1988.** Business travelers comprised 38.6 percent of the resort lodging market in 1987, a 25 percent increase from the previous year.

The report also discusses resort industry profits, occupancy rates, and room nights, the lodging industry's equivalent of inventory.

To receive a copy of the report, send $65 to Laventhol & Horwath, Leisure Time Industries Dept., 1845 Walnut St., Philadelphia, PA, 19103.

● The American Hotel & Motel Association (AH&MA) recently conducted survey focusing on the continually upgraded services offered by lodging properties. Compiled by Smith Travel Research, the survey was distributed to over 9,000 AH&MA member properties.

Highlights of the survey include:

- More than half of all respondents allow pets.
- Nearly two-thirds have handicap access.
- 61 percent offer no-smoking floors.

The survey's results are available for free by writing to the AH&MA Communications Department, 1201 New York Ave., Washington, D.C., 20005, or call 202/289-3133.

● **Innkeeping,** the national trade publication for owners and operators of bed & breakfast/country inn establishments, sponsored the **1988 Bed & Breakfast/Country Inn Industry Survey.** The survey's topics include profit and loss statements, occupancy analysis, pricing analysis, operating statistics, and marketing analysis.

To obtain a copy of the **1988 B & B/Country Inn Industry Survey**, send $125 to **Innkeeping** Study, 1333 Bath Street, Santa Barbara, California, 93101; or call 805/965-0707.

"Discoveries" is a **Travel Printout** feature designed to give added exposure to all types of travel-related research. To see your company's travel research projects in future editions of "Discoveries," send a brief description of the report, including price, address, and contact name, to **Travel Printout**, US Travel Data Center, 1133 21st Street, Washington, D.C., 20036. ##

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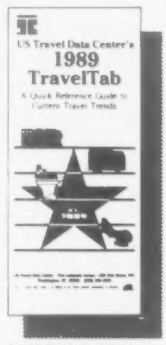

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Current Travel Indicators

CURRENT TRAVEL INDICATORS 1989

	Current Month 1989	Current Value	Percent Change: Previous Month	Percent Change: Year-Ago Month	Percent Change: Year to Date
Establishments Receipts or Retail Sales					
Hotels, motels and other lodging places(1)	Jan	$ 4,252 million	29.4	9.5	9.5
Eating and Drinking Places(2)	Jan	13,983 million	1.2	11.4	11.4
Gasoline Service Stations(2)	Jan	9,194 million	1.0	5.0	5.0
Commercial Lodging Demand					
Hotel/Motel Occupancy Rates(3)	Jan	61.1 percent	-2.2	0.3	0.3
Real Demand for Commercial Lodging(4)	Jan	49.1 million	11.2	4.3	4.3
Airline Passenger Traffic(5)					
Domestic Revenue Passenger-Miles	Jan	24.1 billion	-5.0	2.9	2.9
International Revenue Passenger-Miles	Jan	7.2 billion	0.9	14.3	14.3
Highway Traffic Volume(6)					
Rural Arterial Passenger-Miles	Jan	36.4 billion	-7.9	8.1	8.1
Rail Passenger Traffic(7)					
Amtrak Passenger-Miles	Jan	443.7 million	-8.7	6.7	6.7
Travel Price Index(1982-84=100) (8)	Jan	120.6	1.0	3.4	3.4
U.S. Resident Travel					
Total Person-Trips(9)	Jan	79.5 million	-23.1	5.7	5.7
Vacation Person-Trips(9)	Jan	51.9 million	-26.7	18.0	18.0
Total Person-Nights(10)	Jan	339.6 million	-19.9	4.7	4.7
Vacation Person-Nights(10)	Jan	272.2 million	-23.2	26.6	26.6
Public Use of National Parks(11)					
Visits	Jan	11,180,529	3.0	14.6	14.6
Overnight Stays	Jan	373,526	10.2	-1.6	-1.6
Foreign Arrivals in the U.S.					
From Overseas(12)	Nov	854,643	-19.4	12.6	21.0
	Dec	919,002	7.5	7.2	19.9
From Canada(13)	Jan	897,567	11.4	14.3	14.3
From Mexico(12)	Nov	76,962	-14.3	28.6	14.2
	Dec	113,762	47.8	44.8	16.9
U.S. Citizen Departures					
To Overseas(12)	Oct	1,195,433	-3.4	13.8	6.4
	Nov	1,042,407	-12.8	13.0	6.9
	Dec	1,178,482	13.1	-5.3	5.8
To Canada(13)	Jan	399,341	-30.6	-4.6	-4.6
Domestic Demand for Motor Gasoline(14)					
Barrels per Day	Jan	6,732 thousand	-8.3	0.8	0.8

(1) Source: Smith Travel Research, seasonally unadjusted. (2) Preliminary; revised monthly. Source: Bureau of the Census. (3) Source: Smith Travel Research, seasonally adjusted, 1986 and 1987 data have been revised. (4) Smith Travel Research, unadjusted room nights sold. (5) Preliminary; U.S. scheduled service air carriers. Source: Air Transport Association. (6) Preliminary, revised monthly. Source: Federal Highway Administration. (7) Source: National Railroad Passenger Corporation (Amtrak). (8) Source: US Travel Data Center and Bureau of Labor Statistics. (9) Source: US Travel Data Center. (10) US Travel Data Center. Data is not comparable to earlier published numbers due to revised methodology. (11) Preliminary; unadjusted for differences in reporting units. Source: National Park Service. (12) Source: U.S. Travel and Tourism Administration. Mexican data reflect 1% arrivals only. (13) Statistics Canada. (14) Preliminary; Source: U.S. Department of Energy.

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US Travel Data Center

May 1989 Volume 18, Number 5

1987 Travel Spending Brings Billions of Dollars to State Economies

Over 40 states collected at least $1 billion each in travel dollars

U.S. residents and foreign visitors spent $291 billion traveling in America during 1987, nearly 9 percent over the previous year. In total, 43 states and the District of Columbia received more than $1 billion each from travel expenditures, reported the US Travel Data Center in it's **1987 Impact of Travel on State Economies**.

These estimates and other economic measures of travel spending in the U.S. were derived from the Data Center's Travel Economic Impact Model (TEIM), the only national economic model which produces consistent estimates of the direct impact of travel on the nation's economy. These figures were used in conjunction with the U.S. Department of Commerce's Regional Input-Output Modeling System (RIMSII) to measure the indirect and induced effects of travelers' expenditures.*

The study reports that California garnered the most travel expenditures during 1987, nearly $36 billion. Florida was second with more than $24 billion, followed by New York, which collected $17 billion in travel dollars. The top five ranking states accounted for almost 40 percent of all U.S. travel spending.

Meal purchases represented 26 percent, or $71 billion, of travel expenditures, while public transportation expenditures comprised 25 percent or $68 billion of total travel dollars. Public transportation expenses showed the largest increase, up nearly 12 percent. Entertainment and recreation expenditures rose 9 percent over 1986.

Travel spending generated more jobs than all other private industries in 13 states and ranked among the top three employers in 37 states. On the average, every $54,600 spent on travel in the U.S. supported one job in 1987. Nevada holds the highest share of travel-generated employment at 32 percent of the state's total payroll.

The **1987 Impact of Travel on State Economies** reports travel spending in each state, the employment, payroll income, and tax revenue generated by travelers, plus the impact of spending in six industry segments including, lodging, food, and transportation.

The **1987 Impact of Travel on State Economies**, mailed directly to Data Center members, is available for $70 from the US Travel Data Center, Two Lafayette Centre, 1133 21st Street, NW, Washington, D.C., 20036.

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* The direct impact of travel spending represents the actual dollars spent by travelers. The indirect impact estimates how much business is generated as firms purchase goods and services to meet traveler demand. The induced impact measures the economic contribution of travel industry employees as they, in turn, spend their wages and salaries. ##

Top States: 1987 Domestic Travel Expenditures

State	Expenditures (billions $)
California	35.8
Florida	24.3
New York	17.2
Texas	15.7
New Jersey	13.3

Summer Vacations Remain Popular Among Americans

An increase in the number of short trips will drive 1989 summer vacation travel to levels that will exceed previous record totals established during June, July and August, 1988, announced the Data Center at its annual Summer Vacation Travel Forecast press conference.

" America wants to travel more than ever and its people are going to satisfy this desire," said Dr. Suzanne Cook, director of the Data Center,

(continued on page 3)

1990 Travel Outlook Forum Covers Ethnic Markets

The US Travel Data Center has lined-up a select panel of speakers for its 1990 Travel Outlook Forum, co-sponsored by the Travel and Tourism Research Association, October 3, 1989, at the Diplomat Resort and Country Club in Hollywood, Florida.

One prestigious group will examine the size, preferences, and travel patterns of various ethnic groups and their impact on the travel industry.

James Loretta, vice president of sales and marketing, the Strategy Research Corporation, will provide the outlook for travel among Hispanic-Americans. William McGuggins of the Mingo Group will discuss travel projections for the Black-American traveler.

Speakers at the forum, themed "1990 -- Gateway to a Decade," will focus on what adjustments the travel industry is expected to undergo in the coming decade.

For more information, contact the Data Center at 202/293-1040. ##

March Travel Price Increase Spurred by Rising Lodging Costs

The overall cost of traveling in the U.S. jumped 2.4 percent during the month of March, spurred by a significant increase in lodging prices, reported the latest Travel Price Index (TPI) compiled by the Data Center.

The TPI, which measures seasonally unadjusted changes in the cost of travel in the U.S., reached 125.1 (1982 - 84 = 100) in March. For comparison, the price of all goods and services purchased by consumers, as measured by the Consumer Price Index (CPI), rose 0.6 percent during the same period to 122.3 (see chart).

The cost of lodging while out of town increased significantly in March, a trend that has continued over the previous three months following a series of declines in the last quarter of 1988.

Transportation costs rose 0.9 percent during March. Motor fuel costs increased 1.5 percent, airline fares rose 0.2 percent, as did intracity public transportation costs. However, other intercity transportation (bus and rail) prices declined 0.5 percent.

The cost of food and beverages purchased while traveling increased 0.4 percent over the previous month, while entertainment prices were up 0.7 percent for March.

The March TPI rose 5.3 percent over year-earlier levels, led by a 6.6 percent gain in airline fares and a 6.1 percent increase in the cost of other intercity transportation. The CPI increased 5.0 percent for the same period. ##

Travel Price Index and Components

March 1989 TPI Component	Monthly % Change February 1989 to March 1989	Annual % Change March 1988 to March 1989
Transportation	0.9	5.8
Airline Fares	0.2	6.6
Other Intercity Trans.	-0.5	6.1
Intracity Public Trans.	0.2	3.1
Motor Fuel	1.5	5.2
Lodging	7.0	5.8
Food and Beverages Away From Home	0.4	4.6
Entertainment	0.7	5.7
TRAVEL PRICE INDEX	2.4	5.3
CONSUMER PRICE INDEX	0.6	5.0

Source: US Travel Data Center and the U.S. Bureau of Labor Statistics

Winter 1988-89 Vacation Travel Rises 6 Percent

Vacation travel during December 1988, and January and February 1989, jumped 6 percent over the previous winter's record-breaking increases, according to the latest results of the National Travel Survey conducted by the Data Center.

The monthly telephone survey reported that overall travel during winter 1988-89 rose just over 2 percent, reaching 246 million person-trips for the three month period. (A person-trip measures each person traveling 100 miles or more).

The survey also found that:

- o Business travel increased more than pleasure travel which remained relatively stable with the previous winter;
- o Auto travel grew nearly 3 percent, while air travel declined 4 percent; and,

According to the survey, February travel grew 7 percent over year-earlier levels, reaching 63.3

(continued on page 3)

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(continued from page 2)
million person-trips.

February vacation travel jumped 13.5 percent, and weekend travel climbed almost 16 percent over February 1988. Business travel, on the other hand, showed only a 1 percent rate of growth.

Air travel increased 9 percent on a person-trip basis in February, while travel by automobile, truck or recreational vehicle rose 5 percent.

The average duration of all trips taken during February fell from 4.1 nights in 1988 to 3.4 nights this year. The average round-trip distance was 920 miles, down from 970 round-trip miles last February. ##

Summer Travel (continued from page 1)

"even if the demands of time are forcing many of them to take three- and four-day trips in lieu of one- and two-week vacations. We must face the reality that Americans may be reaching the limit of time their schedules allow them to be away from home while traveling."

The Data Center forecast predicts that:

- Overall, summer vacation travel will increase by 3 percent over 1988, to 330 million person-trips. (A person-trip is one person traveling 100 miles or more away from home.)
- Summer vacationers will continue to take more weekend and long weekend trips. In fact, the volume of day trips and trips of up to three nights will rise 7 percent and comprise more than half of all summer vacation travel. The number of vacations of four or more nights is actually expected to decline marginally this summer.
- Americans will average 5.5 nights on each trip and spend a total of 1.8 billion nights away from home during the three month season.
- Trips involving hotels are expected to increase 3 - 4 percent this summer, although the actual increase in room-nights may be less due to shorter stays.
- Auto travel will continue to be strong, rising 4 percent over summer 1988 and accounting for 83 percent of all summer vacation travel. Air travel will show little change over the previous summer, while both bus and rail services will operate at or near capacity.
- Travel for sightseeing, entertainment, and outdoor recreation purposes will be most popular during summer 1989, with a projected increase of 6 percent over last summer's record-breaking figures.
- Cities and beaches will be equally favored destination spots this summer, followed by small towns, mountains, lakes, and state/national parks.
- Regionally, the Southeast will attract 27 percent of all summer vacationers, followed by the West with 23 percent, and the Midwest with 17 percent.
- U.S. outbound travel to foreign countries should increase about 3 percent during summer 1989, based on projections for 1989 by the U.S. Travel and Tourism Administration.

The **1989 Summer Vacation Travel Forecast**, is available to **Travel Printout** subscribers for $25, prepaid. Write to: US Travel Data Center, Two Lafayette Centre, 1133 21st St., NW, Washington, D.C., 20036. ##

Visitor Volume at National Parks

Region	FEB 1989 visits	% Change from FEB 1988*	% Change 1988/89*
NEW ENGLAND	282,700	3%	10%
MIDDLE ATLANTIC	929,891	1	2
SOUTH ATLANTIC	2,617,401	-20	-2
EAST SOUTH CENT.	1,168,804	22	5
EAST NORTH CENT.	268,673	4	-3
WEST NORTH CENT.	160,119	-10	3
WEST SOUTH CENT.	425,110	-5	9
MOUNTAIN	1,382,644	-10	-3
PACIFIC	2,583,932	-14	-2
TOTAL	9,819,274	-11	1

* Percent change figures may not be consistent with those previously reported due to National Park Service revisions.

TEIM Update

The Data Center is selecting travel industry and research experts to serve on committees that will provide counsel throughout the revision process of its Travel Economic Impact Model (TEIM), an economic model which estimates the impact of travel spending.

State travel directors, convention and visitor bureau officials, and delegates of other travel-related associations were invited to join the Industry Review Panel which will help determine industry priorities when programing the model's output capabilities.

A Technical Review Panel will advise on modeling techniques and data sources for the TEIM, and include modeling, analysis, and forecasting experts. ##

States comprising the Census regions:
New England: Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont. **Middle Atlantic:** New Jersey, New York, Pennsylvania. **South Atlantic:** Delaware, District of Columbia, Florida, Georgia, Maryland, North Carolina, South Carolina, Virginia, West Virginia. **East South Central:** Alabama, Kentucky, Mississippi, Tennessee. **East North Central:** Illinois, Indiana, Michigan, Ohio, Wisconsin. **West North Central:** Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota, South Dakota. **West South Central:** Arkansas, Louisiana, Oklahoma, Texas. **Mountain:** Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, Wyoming. **Pacific:** Alaska, California, Hawaii, Oregon, Washington.

Current Travel Indicators

CURRENT TRAVEL INDICATORS....1989	Month	Value	Units	Percent Change Last Month	Year Ago	Year To Date
Establishment Receipts or Retail Sales						
Hotels, Motels, Other Lodging Places(1)	Feb	N/A	million			
Eating and Drinking Places(2)	Feb	$13,677	million	-0.7	8.1	9.1
Gasoline Service Stations(2)	Feb	8,633	million	1.8	4.7	3.0
Commercial Lodging Demand						
Hotel/Motel Occupancy Rates(3)	Feb	N/A	%			
Real Demand for Commerical Lodging(4)	Feb	N/A	million			
Airline Passenger Traffic (5)						
Domestic Revenue Passenger-Miles	Feb	22.7	billion	-5.8	-4.3	-0.7
Int'l Revenue Passenger-Miles	Feb	5.8	billion	-18.4	11.2	12.9
Highway Traffic Volume (6)						
Rural Arterial Passenger-Miles	Feb	33.3	billion	-8.9	3.0	5.7
Rail Passenger Traffic (7)						
Amtrak Passenger-Miles	Feb	524.3	million	27.6	15.5	10.7
Travel Price Index (1982 - 84 = 100) (8)	Feb	122.1		1.2	4.6	4.0
U.S. Resident Travel						
Total Person-trips(9)	Feb	63.3	million	-20.4	6.9	6.3
Vacation Person-trips(9)	Feb	41.2	million	-20.6	13.5	15.9
Total Person-nights(10)	Feb	213.1	million	-37.2	7.1	5.6
Vacation Person-nights(10)	Feb	149.4	million	-45.1	22.5	25.1
Public Use of National Parks (11)						
Visits	Feb	9,819,274		-12.2	-11.1	1.0
Overnight Stays	Feb	412,620		10.5	-15.7	-9.5
Foreign Arrivals to the U.S.						
From Overseas(12)	Jan	880,042		-4.2	12.7	12.7
From Canada(13)	Feb	822,542		-8.1	11.9	13.0
From Mexics(12)	Jan	80,955		-28.8	58.8	58.8
U.S. Citizen Departures						
To Overseas(12)	Jan	N/A				
To Canada(13)	Feb	445,298		12.1	-11.7	-8.7
Domestic Demand for Gasoline - Barrels/Day(14)	Feb	7,095	thousand	5.4	1.3	1.1

(1) Source: Smith Travel Research, seasonally unadjusted. (2) Preliminary; revised monthly. Source: Bureau of the Census. (3) Source: Smith Travel Research, seasonally adjusted, 1986 and 1987 data have been revised. (4) Smith Travel Research, unadjusted room nights sold. (5) Preliminary; U.S. scheduled service air carriers. Source: Air Transport Association. (6) Preliminary; revised monthly. Source: Federal Highway Administration. (7) Source: National Railroad Passenger Corporation (Amtrak). (8) Source: US Travel Data Center and Bureau of Labor Statistics. (9) Source: US Travel Data Center. (10) US Travel Data Center. Data is not comparable to earlier published numbers due to revised methodology. (11) Preliminary; unadjusted for differences in reporting units. Source: National Park Service. (12) Source: U.S. Travel and Tourism Administration. Mexican data reflect 194 arrivals only. (13) Statistics Canada (14) Preliminary; Source: U.S. Department of Energy.

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May 1989

TRAVEL PRINTOUT

Research News for the U.S. Travel Industry

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Research News for the U.S. Travel Industry

TRAVEL PRINTOUT

US Travel Data Center

June 1989 Volume 18, Number 6

Business Travel Climbs 50 Percent Since 1983

Business travel, one of the fastest growing segments in the industry, has jumped 50 percent over the past five years, according to the US Travel Data Center's most recent publication, the 1988 Survey of Business Travelers. Thirty-three million business travelers took 156 million business trips last year, accounting for 24 percent of all travel in the U.S.

The Survey of Business Travelers, sponsored by Reed International, is conducted in conjunction with the Data Center's National Travel Survey. The 1988 Survey of Business Travelers features data series covering business travel trends over the past three-to-five years, and provides expanded detail on several business traveler segments.

Although the actual number of business travelers decreased marginally, the frequency of business trips per traveler increased in 1988. Frequent business travelers (those who take 10 or more trips per year) represented 15 percent of all business travelers, yet logged more than half of all business trips taken in 1988.

The study also reports that:

- Women are taking more business trips and, in 1988, accounted for nearly 40 percent of all business travelers. Women business travelers and their share of the business travel market will continue to increase as they achieve positions that require more travel.
- Business travelers aged 35 - 44, employees of the service industries, and international business travelers are the fastest growing segments of the business travel market.
- The largest share of business travelers, 43 percent, traveled to attend meetings, conventions, or trade shows on their most recent trip in 1988.
- Seventy-three percent of business travelers stayed in hotels or motels on an average trip in 1988.
- Nearly one out of every four business travelers combined vacation travel on the average business trip in 1988. Forty-five percent of business travelers combined business and vacation on at least one business trip during 1988.

The 90-page report profiles business travelers according to demographic and trip characteristics, as well as their use of various travel services.

The 1988 Survey of Business Travelers, sent free to Data Center full members, is available to others for $85, prepaid, from the US Travel Data Center, Two Lafayette Centre, 1133 21st Street, NW, Washington, D.C., 20036. ##

Travel Outlook Forum Presents Consumers Propensity to Travel in 1990

Dr. George C. Eads, chief economist of the General Motors Corporation, will present an outlook for the 1990 economy and discuss how this will affect consumers' propensity to purchase travel in the coming year at the US Travel Data Center's 1990 Travel Outlook Forum, preceding the Travel Industry Association of America's National Conference, on October 3, in Hollywood, Florida at the Diplomat Resort & Country Club. This year's program, co-sponsored by the Travel and Tourism Research Association, will look ahead to the 1990s and examine how the industry can adjust to the forces that affect travel and tourism.

Dr. Eads was appointed General Motors' vice president and chief economist in 1986 following a distinguished career in academic and government circles, including his previous position as Dean of the School of Public Affairs at the University of Maryland.

Dr. Eads also served as a member of President Carter's Council of Economic Advisors (CEA) where he supervised the Council's participation in energy, agriculture, industry and international trade policies.

Registration fees for Data Center/TIA/TTRA members for the entire 3-day conference are $395, $425 for others. The forum alone is $195 for members, $220 for others.

For further information or to register for the conference and forum, contact the Data Center at Two Lafayette Centre, 1133 21st Street, NW, Washington, D.C., 20036. ##

Rising Motor Fuel Costs Lead April Travel Price Increase

Motor fuel prices soared 13 percent during April, while lodging prices fell for the first time in four months, according to the latest Travel Price Index (TPI) prepared by the US Travel Data Center.

The TPI, which measures seasonally unadjusted changes in the cost of travel in the U.S., rose 0.5 percent reaching 125.7 (1982 - 84 = 100) in April. For comparison, the overall cost of all goods and services purchased by Americans as measured by the Consumer Price Index (CPI), rose 0.7 percent to 123.1 during the same period.

The sizeable increase in motor fuel lead the 7.4 percent increase in transportation costs; however, the cost of lodging while out of town dropped more than 3 percent from the previous month. The cost of food and beverages purchased while traveling rose 0.4 percent; entertainment costs increased 0.6 percent, while airline fares climbed 0.2 percent for the month.

The April TPI edged 5.5 percent over the 12-month period; the CPI rose 5.1 percent. ##

/ /

Travel Price Index and Components

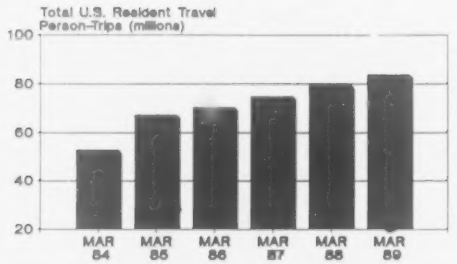
April 1989 TPI Component	Monthly % Change March to April 1989	Annual % Change April 1988 to April 1989
Transportation	7.4	11.4
Airline Fares	0.2	5.4
Other Intercity Trans	0.2	6.3
Intracity Public Trans	0.1	3.1
Motor Fuel	13.0	16.0
Lodging	-3.1	3.1
Food and Beverages Away From Home	0.4	4.6
Entertainment	0.6	6.5
TRAVEL PRICE INDEX	0.5	5.5
CONSUMER PRICE INDEX	0.7	5.1

Source: US Travel Data Center and the U.S. Bureau of Labor Statistics

March Travel Climbs 6 Percent

Travel during March rose nearly 6 percent over the previous year, led by sharp increases in both vacation and pleasure travel, according to the latest results of the Data Center's National Travel Survey.

The monthly telephone survey reported that Americans took almost 84 million person-trips



during March 1989. (A person-trip measures each person traveling 100 miles or more from home.)

The March survey also showed that:

- Weekend travel increased 6 percent, while travel for business declined;
- Travel by auto/truck/RV grew 7 percent, while air travel showed a notable decrease compared to the previous March;
- Average round-trip distance was 880 miles, down from 980 miles one year ago;
- The average duration of trips fell from 3.9 nights a year ago to 3.5 nights this March.

The National Travel Survey results for spring 1989 will be included in the Data Center's 1989 Spring Travel Executive Briefing and Market Close-Up, scheduled for release later this summer. Order ahead for your copies of all the National Travel Survey seasonal reports by writing to the Data Center Publication Department, 1133 21st Street, NW, Washington, D.C., 20036. ##

TEIM Update

The project team supervising the comprehensive revision and update to the Data Center's Travel Economic Impact Model (TEIM), an economic model that estimates the impact of travel on the nation's economy, is currently examining alternate methodologies for use in the TEIM.

Recommendations for alternative modeling techniques have been prepared for each of the travel-related business sectors' expenditures, including transportation, lodging, food, and entertainment, which are needed to produce TEIM estimates. The TEIM technical review committee, a panel of industry and research experts selected to provide guidance on modeling techniques, will study and comment on the suggested alternative methodologies. ##

TRAVEL PRINTOUT is published monthly by the US Travel Data Center, the national non-profit center for travel and tourism research, and an affiliate of Travel Industry Association of America, Two Lafayette Center, 1133 21st Street NW, Washington, D.C. 20036. Telephone: 202/293-1040. Suzanne D. Cook, Director, Julie Bowers, Editor.

Travel Printout reports on Data Center Projects, national travel research conducted by other respected organizations, and trends in the U.S. travel industry. Subscriptions are $70 per year, U.S., Canada and Mexico; other foreign countries, $80 per year, payable in U.S. funds only. ISSN: 0744-6233.

Discover America 2000: Travel Forecast for the Next Century

By Margaret Amein,
Survey Research Analyst, US Travel Data Center

Marketers from dozens of travel industry business are discovering the great variety of data on changing social, demographic and economic trends available in **Discover America 2000**, a report prepared by the US Travel Data Center for the Travel Industry Association's (TIA) Discover America program.

Written with the understanding that the travel industry is highly dependent on consumer mores and attitudes toward travel, the report is filled with facts on American consumer behavior and demographic make-up from the late 1980s through the year 2000. The following sections covering American family life and consumer behavior are examples of the type of information available in the report along with charts and graphs showing historical series of data.

AMERICAN FAMILY LIFE

- American family life appears to be making a comeback. Between 1986 and 1987, the number of family households grew faster than the number of non-family households, reversing a 20-year trend. Because of the aging of the Baby Boom and the AIDS scare, some observers expect this trend to continue despite projections by the Bureau of the Census to the contrary.

- The renewed interest in the family is apparently not a throwback to 1950s sex roles, but a blend of traditional values of home, family and work with a new emphasis on shared responsibilities.

- Eighty-nine percent of Americans agree that it is important for fathers to spend as much time with children as their mothers. This attitude has produced the new "renaissance father" whose first priority is raising children, or "parenting."

CONSUMER BEHAVIOR

- The 1980s has been labeled the "Spree Decade," referring to the prevalence of easy credit, pro-consumption tax policies, and the ethics of materialism. Since 1980, consumer purchases of products and services have increased 26 percent faster than the overall growth in the economy.

- Baby Boomers, now in their prime years of earning and spending, will energize the market for consumer durables and wield unprecedented economic power in the years ahead. By the year 2000, Baby Boomers will head 44 percent of all households and account for 56-58 percent of purchases of most consumer categories.

- Forty million households now own a VCR, compared to only five million five years ago; experts predict that 70 percent of all TV-owning households will have a VCR by 1992. As a result, videocassette-marketed products and services may become the "junk mail" of the 1990s.

Visitor Volume at National Parks

Region	MAR 1989 visits	% Change from MAR 1988*	Year to Date % Change 1988/89*
NEW ENGLAND	493,395	13.7	10.9%
MIDDLE ATLANTIC	1,626,333	5.8	3.6
SOUTH ATLANTIC	5,548,236	-5.2	-3.1
EAST SOUTH CENT.	1,610,053	1.8	4.1
EAST NORTH CENT.	243,240	3.7	-1.1
WEST NORTH CENT.	329,161	-22.3	-11.1
WEST SOUTH CENT.	816,378	4.5	6.9
MOUNTAIN	2,281,447	5.3	0.7
PACIFIC	3,205,306	-6.3	-4.0
TOTAL	16,153,549	-1.7	-0.8

* Percent change figures may not be consistent with those previously reported due to National Park Service revisions.

Discover America 2000 is available to members of the US Travel Data Center, TIA, and the Travel and Tourism Research Association for $50 ($75 for non-members), prepaid, from the Travel Industry Association of America, Marketing Department, Two Lafayette Centre, 1133 21st Street, NW, Washington, D.C., 20036; (202) 293-1433. Contact TIA regarding special discounts for educators, students, and bulk orders. ##

States comprising the Census regions:
New England: Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont. **Middle Atlantic:** New Jersey, New York, Pennsylvania. **South Atlantic:** Delaware, District of Columbia, Florida, Georgia, Maryland, North Carolina, South Carolina, Virginia, West Virginia. **East South Central:** Alabama, Kentucky, Mississippi, Tennessee. **East North Central:** Illinois, Indiana, Michigan, Ohio, Wisconsin. **West North Central:** Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota, South Dakota. **West South Central:** Arkansas, Louisiana, Oklahoma, Texas. **Mountain:** Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, Wyoming. **Pacific:** Alaska, California, Hawaii, Oregon, Washington.

Current Travel Indicators

CURRENT TRAVEL INDICATORS...1989	Month	Value	Units	Percent Change Last Month	Year Ago	Year To Date
Establishment Receipts or Retail Sales						
Hotels, Motels, Other Lodging Places(1)	Feb	$ 4,888	million	15.0	8.8	9.1
	Mar	$ 5,520	million	7.4	8.7	9.0
Eating and Drinking Places(2)	Mar	$13,663	million	-0.1	7.6	8.6
Gasoline Service Stations(2)	Mar	$ 8,836	million	2.4	4.3	3.4
Commercial Lodging Demand						
Hotel/Motel Occupancy Rates(3)	Feb	61.7	percent	1.0	1.3	0.8
	Mar	63.8	percent	3.4	1.9	1.2
Real Demand for Commerical Lodging(4)	Feb	56.8	million	15.6	4.3	4.3
	Mar	63.3	million	11.5	4.9	4.5
Airline Passenger Traffic (5)						
Domestic Revenue Passenger Miles	Mar	27.4	billion	20.8	-4.6	-2.2
Int'l Revenue Passenger Miles	Mar	7.3	billion	25.5	10.8	12.1
Highway Traffic Volume (6)						
Rural Arterial Passenger Miles	Mar	42.1	billion	26.6	6.0	5.8
Rail Passenger Traffic (7)						
Amtrak Passenger Miles	Mar	524.3	million	27.6	15.5	10.7
Travel Price Index (1982 - 84 = 100) (8)	Mar	125.1		2.5	5.3	4.5
U.S. Resident Travel						
Total Person-trips(9)	Mar	83.7	million	32.2	5.7	6.0
Vacation Person-trips(9)	Mar	52.9	million	28.4	14.0	15.2
Total Person-nights(10)	Mar	293.8	million	37.9	-4.0	2.1
Vacation Person-nights(10)	Mar	221.1	million	48.2	0.5	15.3
Public Use of National Parks (11)						
Visits	Mar	16,153,549		64.5	-1.7	-0.8
Overnight Stays	Mar	465,021		12.7	3.2	-3.7
Foreign Arrivals to the U.S.						
From Overseas(12)	Feb	832,805		-5.4	9.9	11.3
From Canada(13)	Mar	1,397,926		69.9	25.8	18.4
From Mexics(12)	Feb	60,153		-25.7	13.6	35.8
U.S. Citizen Departures						
To Overseas(12)	Jan	1,005,900		-14.6	6.6	6.6
	Feb	900,700		-10.5	2.7	4.8
To Canada(13)	Mar	584,061		30.9	12.4	-1.1
Domestic Demand for Gasoline - Barrels/Day(14)	Mar	7,258	thousand	2.3	-0.1	0.7

(1) Source: Smith Travel Research, seasonally unadjusted. (2) Preliminary; revised monthly. Source: Bureau of the Census. (3) Source: Smith Travel Research, seasonally adjusted, 1986 and 1987 data have been revised. (4) Smith Travel Research, unadjusted room nights sold. (5) Preliminary; U.S. scheduled service air carriers. Source: Air Transport Association. (6) Preliminary; revised monthly. Source: Federal Highway Administration. (7) Source: National Railroad Passenger Corporation (Amtrak). (8) Source: US Travel Data Center and Bureau of Labor Statistics. (9) Source: US travel Data Center. (10) US Travel Data Center. Data is not comparable to earlier published numbers due to revised methodology. (11) Preliminary; unadjusted for differences in reporting units. Source: National Park Service. (12) Source: U.S. Travel and Tourism Administration. Mexican data reflect 19% arrivals only. (13) Statistics Canada (14) Preliminary; Source: U.S. Department of Energy.

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Research News for the U.S. Travel Industry

TRAVEL PRINTOUT

US Travel Data Center

July 1989 Volume 18, Number 7

Travel Industry Experts Join TEIM Update Project

A Technical Review Panel consisting of travel industry leaders and research experts, will advise the US Travel Data Center on a comprehensive project to expand the capabilities of its Travel Economic Impact Model (TEIM). Developed by the Data Center in 1973, the TEIM generates detailed estimates of the impact of travel spending on national, state, and local economies.

"We are fortunate to have this distinguished group of professionals assisting with the technical aspects of the TEIM revision," said Data Center Director Dr. Suzanne Cook. She added, "Their input will ensure that all segments of the industry are represented accordingly in the model's output data."

Although the Data Center updates the TEIM annually as new information becomes available, the model will now be reviewed and revised, including the addition of foreign visitor and multiplier components as well as a forecasting component that will allow the Data Center to predict travel expenditures for one to five years into the future.

The revised TEIM will also enable federal agencies and business leaders to better evaluate and predict the economic influence of U.S. travel.

The Technical Review Panel will provide the TEIM revision project team with guidance on modeling techniques, relevant tourism research, consumer expenditure behavior, and variables for the new forecasting component.

The panel includes: Dr. Fred W. Bell, Department of Economics, Florida State University; Dr. Malcolm Bevins, Department of Agricultural and Resource Economics, University of Vermont; William J. Carroll, vice president, The Hertz Corp.; Dr. H. Ken Cordell, project leader, Forestry Sciences Laboratory; Paul Georgiou, director of market research, Avis Rent a Car Systems; Jim Godsman, president, Cruise Line International Association; Dr. Charles R. Goeldner, Assoc. Dean for Graduate Programs, College of Business Administration, University of Colorado; Gary Grayley, director of market research, Greyhound Lines, Inc.; Richard Hebert, managing director public affairs, American Automobile Association; Dr. Ken Hornback, chief, statistical office, National Park Service; Dr. George James, president, Airline Economics, Inc.; Dr. Wilbur LaPage, director, New Hampshire Division of Parks, Recreation and Tourism; Mark Lomanno, director of research, Laventhol & Horwath; Dr. James Mak, Department of Economics, University of Hawaii; Susan Mills, director, research and information services, National Restaurant Association; Dr. Ady Milman, Dick Pope, Sr. Institute for Tourism Studies, University of Central Florida; Michael Olsen, vice president of

(see **panel** on page 3)

Travel Outlook Forum Reveals Results of New Consumer Attitude Study

Elaine Maran, senior vice president of the Daniel Yankelovich Group, will discuss Looking Toward the '90s in the Travel Industry, the ground breaking study of industry, trade and consumer attitudes commissioned by CMP Travel Group and Ask Mr. Foster, at the US Travel Data Center's 1990 Travel Outlook Forum. The forum, co-sponsored by the Travel and Tourism Research Association (TTRA), precedes the Travel Industry Association's (TIA) Travel Industry National Conference on October 3, 1989, at the Diplomat Resort and Country Club in Hollywood, Florida.

This year's forum, themed "1990 - Gateway to a Decade," will be the industry's first opportunity to explore this study's findings on leisure travelers, business travel growth, the next international "hot" spots, and what consumers' attitudes towards travel in the 1990s will mean to the industry.

With the Daniel Yankelovich Group, Maran directs design, analysis, presentation and consulting in marketing and social research.

Maran's experience in different phases of research, including qualitative, survey, and test market simulation, led to her success in the new products area.

Registration fees for Data Center/TIA/TTRA members for the conference and forum are $395, $425 for others; the forum only is $195 for members, $220 for others. For more information, contact the Data Center at 202/293-1040. ##

1988 Visitor Spending in New York City Poured $10 Billion into the NYC Economy

In 1988, visitors to New York City spent almost $9.8 billion, a 9.7 percent increase over 1987 spending, according to a benchmark study released by the New York City Convention & Vistors Bureau.

The study, conducted by the US Travel Data Center, utilized the Travel Economic Impact Model (TEIM) to measure the overall impact of travel spending on the New York City economy.

The New York City visitor study marked the first time foreign visitor spending was measured for a metropolitan area by the Data Center. International visitors to New York City totalled approximately 4.6 million, a 15 percent jump over 1987.

Said Marshall Murdaugh, president of the New York Convention & Visitors Bureau, "The international visitor segment represented almost a fourth of all visitors to the city and approximately 26 percent of total visitor spending. Obviously, the growth in international tourism is a mainstay of the city's visitor industry."

U.S. and foreign visitors to New York City directly generated a total of $988.7 million in state and local taxes, an increase of nearly 10 percent over 1987 figures.

Travelers' expenditures in New York City also generated nearly 144,000 jobs, a 3 percent increase over year-earlier levels.

The study also estimated the multiplier, or total, affects of travel spending on the New York City economy, which includes the additional business that is generated to service traveler demand, and the contribution of travel industry employees as they, in turn, spend their earnings.

"Visitor spending benefits all aspects of the city's economy," according to Murdaugh. "Hotels, restaurants, transportation, cultural attractions, etc., benefit directly, while other businesses benefit indirectly. For example, it is estimated that 6 percent of all retail sales are attributed to visitors."

The Data Center plans to conduct additional studies that measure the economic affects of travel spending at the city level. Already scheduled are studies for the Atlanta Convention & Visitors Bureau, the Greater Buffalo Convention & Visitors Bureau, and the North Carolina Association of Convention & Visitor Bureaus, which includes at least 14 individual metropolitan areas.

A summary analysis of the New York City study is available free from the New York Convention & Visitors Bureau. ##

Rising Motor Fuel Costs Lead May Travel Price Increase

The overall cost of traveling in the United States rose 0.5 percent in May, led by a 4.9 percent jump in motor fuel prices, according to the Data Center's lastest Travel Price Index (TPI).

The TPI, which measures the seasonally unadjusted changes in the cost of travel in the U.S., reached 126.3 (1982 - 84 = 100) in May. For comparison, the overall cost of goods and services purchased by consumers as measured by the Consumer Price Index (CPI) reached 123.8, a 0.6 percent increase over year-earlier levels.

Travel Price Index and Components

May 1989 TPI Component	Monthly % Change April to May 1989	Annual % Change May 1988 to May 1989
Transportation	2.9	13.2
Airline Fares	0.2	6.0
Other Intercity Trans.	1.0	5.4
Intracity Public Trans.	0.6	3.3
Motor Fuel	4.9	18.7
Lodging	0.9	2.5
Food and Beverages Away From Home	0.4	4.7
Entertainment	0.3	6.7
TRAVEL PRICE INDEX	0.5	5.7
CONSUMER PRICE INDEX	0.6	5.4

Source: US Travel Data Center and the U.S. Bureau of Labor Statistics

The cost of lodging while out of town declined for the second consecutive month, down 0.9 percent, while the cost of entertainment dropped for the first time this year.

Transportation prices rose 2.9 percent during May, led by the increase in motor fuel costs and a 1 percent rise in the cost of other intercity transportation. Airline fares and intracity public transportation prices reported marginal increases in May.

Annual changes in both the TPI and CPI remained fairly balanced -- the TPI rose almost 5.7 percent, led by a 18.7 percent growth in motor fuel prices and a 13.2 percent jump in transportation costs. Increases in airline fares and entertainment prices also contributed to the yearly TPI increase. The CPI increased 5.4 percent for the 12 month period. ##

TRAVEL PRINTOUT is published monthly by the US Travel Data Center, the national non-profit center for travel and tourism research, and an affiliate of the Travel Industry Association of America, Two Lafayette Center, 1133 21st Street, NW, Washington, D.C., 20036. Telephone:202/293-1040. Dr. Suzanne D. Cook, Director, Julie Bowers, Editor.

Travel Printout reports on Data Center projects, national travel research conducted by other respected organizations, trends in the U.S. travel industry. Subscriptions are $75 per year, U.S.; Canada and Mexico and other foreign countries, $80 per year, payable in U.S. funds only. ISSN: 0744-6233.

April Travel Up 8 Percent

Travel during April jumped nearly 8 percent over year-earlier levels, lead by a significant increase in weekend* and pleasure travel, reports the latest results of the National Travel Survey.

Americans took 81 million person-trips during April, according to the monthly telephone survey. (A person-trip measures each person traveling 100 miles or more away from home.)

The National Travel Survey also revealed:

- Vacation travel rose 6 percent during April;
- Travel for business edged 4 percent;
- Air travel increased 4 percent, while travel by auto, truck, or RV climbed more than 12 percent;
- Trips involving hotels/motels showed a sharp increase.

* There were five weekends in April 1989. ##

Panel (continued from page 1)

corporate communications, National Car Rental Systems Mark Phelps, vice president of research, Runzheimer International; Alan Pisarski, consultant; John Prokopy, director of marketing, Amtrak; Dr. Robert W. Rafuse, senior fellow, Advisory Commission on Intergovernmental Relations; David Redekop, director, the Canadian Tourism Research Institute, The Conference Board of Canada; Dr. James M. Rovelstad, director, Center for Survey & Marketing Research, University of Wisconsin; Dr. William Schaffer, College of Management, Georgia Institute of Technology; Eric Scharf, president, National Association of Passenger Vessel Owners; David A. Swierenga, assistant vice president, Air Transport Association of America; Randell A. Smith, president, Smith Travel Research; Tony Tighe, program analyst, National Endowment for the Arts; Janet Treber, director of research and statistics, American Society of Travel Agents; Dr. Turgut Var, Department of Recreation and Parks, Texas A & M University; James D. Yeiser, assistant director of research, The Rouse Company. ##

Discoveries...

An Ongoing Guide to Current Travel Research

- **An Overview of the U.S. Resort Market,** released by the American Hotel & Motel Association (AH&MA), examines recent trends in resort vacations, destinations hotels, and travel agent bookings.

The **Overview** and transcripts are available to AH&MA members for $20, $35 to non-members. Write the Publications Department, AH&MA, 1201 New York Ave., NW, Washington, D.C. 20005.

- Travel & Leisure's **A Survey of Traveling Americans**, provides a look at travel attitudes and behavior by Americans. The study discusses the long-term impacts of terrorism, foul-ups in travel plans, the popularity of weekend trips, "hot" destination spots, and more.

The study, including the questionnaire, may be obtained from Travel & Leisure, 1120 Avenue of the Americas, New York, NY, 10036, Attn: Publishers Office.

- The **1989 Trends in Travel and Tourism** Advertising Expenditures, released by Ogilvy & Mather, reports on advertising spending in U.S. measured media by airlines, domestic and foreign destinations, and cruise lines. The study covers 1984 - 88 and details total advertising spending for various travel segments and analyses leading advertisers.

Reports are available for $65. Send orders to Ogilvy & Mather Advertising, Edward Berrol, 309 W. 49th Street, New York, NY, 10019. ##

Visitor Volume at National Parks

Region	APR 1989 visits	% Change from APR 1988*	Year to Date % Change 1988/89*
NEW ENGLAND	909,343	4.7	8.1
MIDDLE ATLANTIC	2,331,569	8.1	5.2
SOUTH ATLANTIC	7,449,873	-3.3	-1.3
EAST SOUTH CENT.	1,807,037	-12.2	-1.6
EAST NORTH CENT.	339,330	-2.0	-1.4
WEST NORTH CENT.	476,101	5.3	4.7
WEST SOUTH CENT.	1,033,035	8.4	7.2
MOUNTAIN	2,757,083	10.4	4.5
PACIFIC	3,942,306	-2.4	-3.5
TOTAL	21,045,677	-0.1	0.3

* Percent change figures may not be consistent with those previously reported due to National Park Service revisions.

States comprising the Census regions:
New England: Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont. **Middle Atlantic:** New Jersey, New York, Pennsylvania. **South Atlantic:** Delaware, District of Columbia, Florida, Georgia, Maryland, North Carolina, South Carolina, Virginia, West Virginia. **East South Central:** Alabama, Kentucky, Mississippi, Tennessee. **East North Central:** Illinois, Indiana, Michigan, Ohio, Wisconsin. **West North Central:** Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota, South Dakota. **West South Central:** Arkansas, Louisiana, Oklahoma, Texas. **Mountain:** Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, Wyoming. **Pacific:** Alaska, California, Hawaii, Oregon, Washington.

Current Travel Indicators

CURRENT TRAVEL INDICATORS...1989	Month	Value	Units	Percent Change Last Month	Year Ago	Year To Date
Establishment Receipts or Retail Sales						
Hotels, Motels, Other Lodging Places(1)	Apr	$ 5,144	million	-2.0	10.5	9.4
Eating and Drinking Places(2)	Apr	$13,541	million	-0.9	6.6	8.1
Gasoline Service Stations(2)	Apr	$ 9,032	million	2.2	7.7	4.5
Commercial Lodging Demand						
Hotel/Motel Occupancy Rates(3)	Apr	63.5	percent	-0.5	1.6	1.3
Real Demand for Commerical Lodging(4)	Apr	62.1	million	-1.9	4.8	4.6
Airline Passenger Traffic (5)						
Domestic Revenue Passenger-Miles	Apr	25.3	billion	-7.7	-4.5	-2.8
Int'l Revenue Passenger Miles	Apr	7.2	billion	-1.2	6.7	10.7
Highway Traffic Volume (6)						
Rural Arterial Passenger-Miles	Apr	41.9	billion	-0.5	3.4	5.2
Rail Passenger Traffic (7)						
Amtrak Passenger-Miles	Apr	496.4	million	-5.3	6.3	9.5
Travel Price Index (1982 - 84 = 100) (8)	Apr	125.7		0.5	5.5	4.7
U.S. Resident Travel						
Total Person-trips(9)	Apr	81.1	million	-3.1	7.9	6.5
Vacation Person-trips(9)	Apr	46.0	million	-13.0	6.2	12.9
Total Person-nights(10)	Apr	278.3	million	-5.3	6.2	3.1
Vacation Person-nights(10)	Apr	188.2	million	-14.9	3.8	12.5
Public Use of National Parks (11)						
Visits	Apr	21,045,677		30.3	-0.1	0.3
Overnight Stays	Apr	927,827		21.3	-0.7	-2.6
Foreign Arrivals to the U.S.						
From Overseas(12)	Mar	1,102,058		32.3	16.9	13.4
From Canada(13)	Apr	1,242,805		-11.1	7.5	15.1
From Mexico(12)	Mar	111,526		85.4	29.2	32.8
U.S. Citizen Departures						
To Overseas(12)	Mar	1,005,900		-14.6	6.6	6.6
To Canada(13)	Apr	594,549		1.8	-10.6	-4.1
Domestic Demand for Gasoline - Barrels/Day(14)	Apr	7,150	thousand	-3.7	-3.8	-0.3

(1) Source: Smith Travel Research, seasonally unadjusted. (2) Preliminary; revised monthly. Source: Bureau of the Census. (3) Source: Smith Travel Research, seasonally adjusted, 1986 and 1987 data have been revised. (4) Smith Travel Research, unadjusted room nights sold. (5) Preliminary; U.S. scheduled service air carriers. Source: Air Transport Association. (6) Preliminary; revised monthly. Source: Federal Highway Administration. (7) Source: National Railroad Passenger Corporation (Amtrak). (8) Source: US Travel Data Center and Bureau of Labor Statistics. (9) Source: US Travel Data Center. (10) US Travel Data Center. Data is not comparable to earlier published numbers due to revised methodology. (11) Preliminary; unadjusted for differences in reporting units. Source: National Park Service. (12) Source: U.S. Travel and Tourism Administration. Mexican data reflect 194 arrivals only. (13) Statistics Canada (14) Preliminary; Source: U.S. Department of Energy.

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Research News for the U.S. Travel Industry

TRAVEL PRINTOUT

US Travel Data Center

August 1989 Volume 18, Number 8

New International Travel Figures Boost U.S. Tourism Earnings

New figures released by the U.S. Travel and Tourism Administration (USTTA) show that international travelers are spending more money in the United States than previously estimated, according to Rockwell Schnable, under secretary of commerce for travel and tourism.

The new estimates computed by the Bureau of Economic Analysis (BEA) are based on the in-flight survey conducted by USTTA. Previously, the BEA used estimates based on a survey dependent on a form which international visitors were asked to mail back.

The in-flight survey, filled out by outbound travelers, showed that foreign visitor spending in the U.S. on food, lodging, purchases, and fares was $37.1 billion -- $12.4 billion more than previous estimates based on the old survey method.

With this improved data base, USTTA estimates that in 1988 U.S. tourists spent only $2.9 billion more outside the U.S. than foreign visitors spent here. This is $4.7 billion less than the imbalance estimated using the old method.

At $37.1 billion, tourism is now a greater export revenue generator than agriculture, chemicals, and motor vehicles.

The new figures also show that the U.S. tourism balance with Japan is in surplus of $4.5 billion - Japanese tourists spent $4.5 billion more for travel to the U.S. in 1988 than American travelers spent for travel to Japan. ##

Forum Looks at Reshaping America's Highways and Skyways

J. Kay Aldous, vice president of public and government services for the American Automobile Association, will discuss the prospects for America's aging highways and skyways and how their present conditions are affecting Americans' decisions to travel at the US Travel Data Center's fifteenth annual Travel Outlook Forum on October 3, 1989, at the Diplomat Resort and Country Club in Hollywood, Florida. The forum is cosponsored by the Travel and Tourism Research Association (TTRA), and precedes the Travel Industry Association's (TIA) Travel Industry National Conference.

The theme of this year's forum is "1990 - Gateway to a Decade." Travel experts from all major sectors of the industry will offer their predictions on the outlook for travel and tourism in 1990 and the next decade.

Using data compiled by the Data Center, Aldous will reveal new findings on consumers' attitudes towards automobile and air travel. Is traffic congestion affecting vacation travel on the nation's highways and skyways? Do Americans consider driving time part of their vacation, or do they dread the thought of possible delays? What other travel factors or problems influence consumers' vacation plans?

Aldous oversees several departments within AAA including public relations, publications and traffic safety, highway transportation, and legislative affairs. He also serves as chairman of the U.S. Congressional Travel and Tourism Caucus advisory board and chairing the World Traffic Commission, International Touring Alliance.

For more information or to register for the forum and conference, contact the Data Center, Two Lafayette Centre, 1133 21st Street, NW, Washington, D.C. 20036; 202/293-1040. ##

1989 National Travel Survey Seasonal Reports

- Make your own projections for 1990
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- Fine-tune your current marketing plan
- Trace the growth of each travel season over the past five years

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June Travel Prices Show Moderate Gain

The cost of travel in the United States rose 0.6 percent in June, a moderate gain balanced by increases in entertainment and lodging costs and a decline in motor fuel prices, according to the Data Center's latest Travel Price Index (TPI).

The TPI, which measures the seasonally unadjusted changes in the cost of travel in the U.S., reached 127.1 (1982 - 84 = 100) in June. For comparison, the Consumer Price Index (CPI) reached 124.1, a 0.2 percent increase over the previous month (see chart).

Travel Price Index and Components

June 1989 TPI Component	Monthly % Change May to June 1989	Annual % Change June 1988 to June 1989
Transportation	-0.1	12.8
Airline Fares	0.6	6.1
Other Intercity Trans.	1.2	3.9
Intracity Public Trans.	0.0	3.2
Motor Fuel	-0.6	17.9
Lodging	1.5	2.9
Food and Beverages Away From Home	0.3	4.6
Entertainment	1.6	8.1
TRAVEL PRICE INDEX	0.6	5.7
CONSUMER PRICE INDEX	0.2	5.2

Source: US Travel Data Center and the U.S. Bureau of Labor Statistics

The cost of lodging while out of town rose 1.5 percent in June; entertainment prices increased 1.6 percent. The cost of motor fuel, however, declined for the first time in several months, down 0.6 percent from May 1989.

The overall cost of transportation decreased in June, falling 0.1 percent. Airline fares rose 0.6; other intercity public transportation costs climbed 1.2 percent, while intracity public transportation showed no change.

The overall cost of travel in the U.S. climbed 5.7 percent over the past 12 months since June 1988, led by a 17.9 percent jump in motor fuel prices and a 12.8 percent increase in transportation costs. The CPI increased 5.2 percent for the same period. ##

May Travel Jumps 7 Percent

May travel volumes increased nearly 7 percent over year-earlier levels, due to strong growth in all travel segments, including a sizeable gain in business travel for the month, reports the Data Center's National Travel Survey (NTS).

The monthly telephone survey reports that Americans took 111 million person-trips in May. (A person-trip measures each time one person takes one trip 100 miles or more away from home.)

The May NTS also revealed that:

- Vacation travel and weekend travel both increased 5 percent;
- Air travel rose 3 percent, while travel by auto grew 10 percent; and
- Use of hotels rose nearly 9 percent.
- The average round-trip distance lengthened to 1,000 miles per trip, up from 960 one year ago, yet the average duration of trips fell from four nights last year to just 3.2 nights in May 1989.

Traveling With Children Rises in 1988

The number of trips involving adults and children traveling together increased more than 7 percent in 1988, accounting for 17 percent of all trips, reports recent findings of the National Travel Survey.

"Short and sweet" tended to be the dominating characteristic of trips including children last year. More than half of all such trips occurred over a weekend or long weekend compared to 39 percent when adults traveled without the little ones.

The National Travel Survey also found that:

- Vacation trips accounted for a substantially higher percentage of trips with children than those without. More than 75 percent of all trips including adults and children were for vacation, while 57 percent of adult-only trips counted as vacation travel.
- In 1988, however, 5 percent of all business trips (8 million trips) included children, up 2 percent from 1987.
- Adults traveling with children tended to stay somewhat closer to home than those without children. Trips with kids averaged 860 miles round-trip, while adult-only trips averaged nearly 1,000 miles round-trip.

(continued on page 3)

TRAVEL PRINTOUT is published monthly by the US Travel Data Center, the national non-profit center for travel and tourism research, and an affiliate of the Travel Industry Association of America, Two Lafayette Center, 1133 21st Street, NW, Washington, D.C., 20036. Telephone:202/293-1040. Dr. Suzanne D. Cook, Director, Julie Bowers, Editor.

Travel Printout reports on Data Center projects, national travel research conducted by other respected organizations, trends in the U.S. travel industry. Subscriptions are $75 per year, U.S.; Canada and Mexico and other foreign countries, $80 per year, payable in U.S. funds only. ISSN: 0744-6233.

(from page 2)

- Adults traveling with youngsters also prefer to go by car. Last year, 85 percent of trips with children involved an automobile, truck, or recreational vehicle as the primary mode of transportation, while just 12 percent traveled by air.

- The same regions of the country that produced the greatest concentration of trips with kids also attracted the most. The South Atlantic, East North Central, and Pacific are all popular regions of the U.S. for travel with children. ##

TEIM Update

The Data Center's Travel Economic Impact Model (TEIM) revision project team is interviewing past clients and other data users within the travel industry who are familiar with TEIM economic impact studies. Through these interviews the project team will ask for suggestions for improvement in the model's output data and find out what types of additional information would be useful.

These comments will serve as useful input to assist the project team to identify data user needs, any problems with statistics generated from the TEIM and other models, and additional estimates that might be appropriate for inclusion in plans for the revised model.

The entire TEIM revision project will be completed in the first half of 1990.

For more information about the Travel Economic Impact Model, the revision project, or the model's capabilities, contact Dr. William Fleming, manager of economic studies, US Travel Data Center, Two Lafayette Centre, 1133 21st Street, NW, Washington, D.C., 20036. ##

New Data Center Product Announcement

The Data Center's travel economic impact studies are now easy to present to groups. Estimates of U.S. travel spending in individual states, counties and cities, as well as the impact of this spending on payroll income, employment, and state and local tax revenue are available on slides complete with script with camera-ready copy of all charts and tables.

These new features are available through a graphics package incorporated exclusively with Data Center travel economic impact studies.

Travel industry officials can use travel economic impact studies and presentations to support tourism development not only at the state level, but locally as well.

With no prepartion, organizations can efficiently:

- educate area legislators and economists about the widespread contributions of travel and tourism in their area;

- increase productivity of tourism employees by showing how their contributions elevate the economic well-being of their community;

- demonstrate to the public (through the media and other avenues) the beneficial effects of travel activity in generating jobs, income, and tax revenue.

For further information about travel economic impact studies and the benefits of the new graphics products, contact Sarah Garrison, economic analyst at the US Travel Data Center; 202/293-1040. ##

Visitor Volume at National Parks

Region	MAY 1989 visits	% Change from MAY 1988*	Year to Date % Change 1988/89*
NEW ENGLAND	1,369,071	7.7	10.4%
MIDDLE ATLANTIC	3,079,836	-8.1	-0.3
SOUTH ATLANTIC	9,182,088	-1.7	-1.9
EAST SOUTH CENT.	2,011,313	-4.5	-3.6
EAST NORTH CENT.	556,934	-13.3	-5.8
WEST NORTH CENT.	908,129	2.3	3.6
WEST SOUTH CENT.	1,170,592	1.0	5.0
MOUNTAIN	3,967,912	3.6	4.2
PACIFIC	4,348,941	-11.3	-5.1
TOTAL	26,594,816	-3.2	-1.0

* Percent change figures may not be consistent with those previously reported due to National Park Service revisions.

States comprising the Census regions:
New England: Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont. **Middle Atlantic:** New Jersey, New York, Pennsylvania. **South Atlantic:** Delaware, District of Columbia, Florida, Georgia, Maryland, North Carolina, South Carolina, Virginia, West Virginia. **East South Central:** Alabama, Kentucky, Mississippi, Tennessee. **East North Central:** Illinois, Indiana, Michigan, Ohio, Wisconsin. **West North Central:** Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota, South Dakota. **West South Central:** Arkansas, Louisiana, Oklahoma, Texas. **Mountain:** Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, Wyoming. **Pacific:** Alaska, California, Hawaii, Oregon, Washington.

Current Travel Indicators

CURRENT TRAVEL INDICATORS...1989

	Month	Value	Units	Percent Change Last Month	Year Ago	Year To Date
Establishment Receipts or Retail Sales						
Hotels, Motels, Other Lodging Places(1)	May	$ 5,068	million	-1.5	9.5	9.4
Eating and Drinking Places(2)	May	$13,537	million	-0.2	5.8	7.5
Gasoline Service Stations(2)	May	$ 9,371	million	2.0	10.5	6.1
Commercial Lodging Demand						
Hotel/Motel Occupancy Rates(3)	May	63.9	percent	0.6	2.7	1.6
Real Demand for Commerical Lodging(4)	May	62.2	million	0.1	5.6	4.8
Airline Passenger Traffic (5)						
Domestic Revenue Passenger-Miles	May	26.1	billion	3.2	-3.1	-2.9
Int'l Revenue Passenger-Miles	May	8.3	billion	15.1	11.5	10.9
Highway Traffic Volume (6)						
Rural Arterial Passenger-Miles	May	42.0	billion	0.2	-4.3	3.0
Rail Passenger Traffic (7)						
Amtrak Passenger-Miles	May	507.0	million	2.1	5.7	8.7
Travel Price Index (1982 - 84 = 100) (8)	May	126.3		0.5	5.7	4.9
U.S. Resident Travel						
Total Person-trips(9)	May	110.9	million	36.7	6.5	6.5
Vacation Person-trips(9)	May	71.2	million	54.8	4.7	10.6
Total Person-nights(10)	May	357.0	million	28.3	-14.4	-1.8
Vacation Person-nights(10)	May	254.0	million	35.0	-15.5	4.4
Public Use of National Parks (11)						
Visits	May	26,594,816		26.4	-3.2	-1.0
Overnight Stays	May	1,497,272		61.4	3.8	-0.3
Foreign Arrivals to the U.S.						
From Overseas(12)	Apr	1,033,861		-6.2	22.6	15.8
From Canada(13)	May	1,172,309		-5.7	8.4	13.6
From Mexico(12)	Apr	79,460		-28.8	23.8	30.5
U.S. Citizen Departures						
To Overseas(12)	Apr	1,104,700		-2.0	3.7	4.6
To Canada(13)	May	1,027,408		72.8	-4.4	-4.2
Domestic Demand for Gasoline						
Barrels/Day(14)	May	7,416	thousand	3.7	1.6	0.1

(1) Source: Smith Travel Research, seasonally unadjusted. (2) Preliminary; revised monthly. Source: Bureau of the Census. (3) Source: Smith Travel Research, seasonally adjusted, 1986 and 1987 data have been revised. (4) Smith Travel Research, unadjusted room nights sold. (5) Preliminary; U.S. scheduled service air carriers. Source: Air Transport Association. (6) Preliminary; revised monthly. Source: Federal Highway Administration. (7) Source: National Railroad Passenger Corporation (Amtrak). (8) Source: US Travel Data Center and Bureau of Labor Statistics. (9) Source: IS Travel Data Center. (10) US Travel Data Center. Data is not comparable to earlier published numbers due to revised methodology. (11) Preliminary; unadjusted for differences in reporting units. Source: National Park Service. (12) Source: U.S. Travel and Tourism Administration. Mexican data reflect 19% arrivals only. (13) Statistics Canada (14) Preliminary; Source: U.S. Department of Energy.

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TRAVEL PRINTOUT

US Travel Data Center

September 1989 Volume 18, Number 9

U.S. Travel Remains Strong in First Half of 1989

Travel in the U.S. is expected to reach record-breaking levels in 1989, with person-trips projected to exceed 1.3 billion by the end of the year, according to recent results of the US Travel Data Center's National Travel Survey. (A person-trips measures one person on a trip to a place 100 miles or more away from home). Data Center Executive Director Dr. Suzanne Cook will reveal other projections for domestic travel in 1989 at the Data Center's fifteenth annual Travel Outlook Forum, cosponsored by the Travel and Tourism Research Association. The forum precedes the opening of the Travel Industry Association's Travel Industry National Conference on October 3, 1989, in Hollywood, Florida.

The theme of this year's forum is "1990 - Gateway to a Decade". Experts from the major segments of the travel industry will offer their forecasts for what can be expected to take place in their markets for the coming year. Several speakers, including J. Kay Aldous, vice president of public and government services for the American Automobile Association, and Michael Marien, editor of Future Survey, will look ahead to the 1990s to see how environmental and infrastructure concerns could affect travel in the next decade.

A review of the US Travel Data Center's travel projections for 1989 include:

♦ Total nights spent away from home while traveling may reach 5.3 billion by year end, a 2.4 percent increase over 1988.

♦ Shorter trips continue to be more popular among American travelers. Through June, day trips now represent 13 percent of all travel in 1989, trips of 1 to 3 nights account for 52 percent, while trips of 4 or more nights cover 35 percent.

♦ So far this year, business travel is up 5 percent over 1988 and, if it continues to grow at this rate through 1989, will account for approximately 223 million person-trips by year end.

♦ Vacation travel, representing 67 percent of all travel and growing steadily since 1984, increased 9 percent during the first half of 1989. The Data Center projects that vacation person-trips could reach an all-time high of about 900 million this year.

♦ Weekend and long weekend vacations remain particularly popular for Americans in 1989. Weekend vacationing is expected to increase about 2 percent over 1988's significant 8 percent rate of growth.

♦ Automobile continues to be the preferred mode of transportation, now representing 77 percent of all trips.

♦ Auto/truck/RV traffic growth is expected to outpace that of air travel for the second consecutive year. During the first six months of 1989, auto travel increased 3 percent, while domestic air service declined 3 percent.

♦ Economically, 1989 travel industry sales have so far exceeded Gross National Product (GNP) growth by a full percentage point.

♦ Travel prices, as measured by the Data Center's Travel Price Index (TPI), are rising somewhat faster than overall consumer costs measured by the Consumer Price Index (CPI). The TPI has increased 6.7 percent so far in 1989, while the CPI has risen 5.4 percent.

♦ The price of gasoline has jumped 6.5 percent in 1989, contributing to the 6 percent increase in both intercity transportation costs and air fares.

Additional forecasts presented at the 1990 Travel Outlook Forum will be featured in next month's issue of **Travel Printout**. The complete proceedings of the forum will be available in December. To order your issue in advance, send $100 per copy to the Data Center's Publication Department, Two Lafayette Centre, 1133 21st St., NW, Washington, DC, 20036. ♦♦

July Travel Price Increase Led by Rising Lodging Costs

The overall cost of traveling in the U.S. rose 2.2 percent in July, led by a 7.2 percent jump in lodging prices, according to the Data Center's monthly Travel Price Index (TPI).

The TPI, which measures seasonally unadjusted changes in the cost of travel in the U.S., reached 129.9 (1982 - 84 = 100) in July. For comparison, the overall cost of goods and services as measured by the Consumer Price Index (CPI) rose only 0.2 percent for the month to 124.4.

The cost of transportation declined 0.9 percent in July, prompted by a 1.7 percent drop in the price of motor fuel. Intracity public transportation costs rose 0.3 percent and other intercity transportation prices increased 0.2 percent. Air fares showed no change. The cost of food and beverages purchased while traveling climbed 0.5 percent, while entertainment prices rose 1.2 percent in July.

Compared to year-earlier levels, the overall cost of travel increased 7.1 percent in July, led by a 10.9 percent jump in transportation costs. This increase in transportation prices resulted from a 14.7 percent rise in motor fuel prices and a 6 percent increase in airline fares. The CPI rose 5 percent for the same period. ♦♦

Travel Price Index and Components

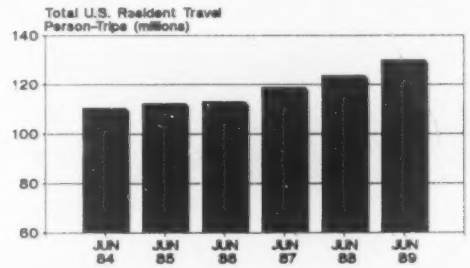
July 1989 TPI Component	Monthly % Change June to July 1989	Annual % Change July 1988 to July 1989
Transportation	-0.9	10.9
Airline Fares	0.0	6.0
Other Intercity Trans.	0.2	4.1
Intracity Public Trans.	0.3	2.4
Motor Fuel	-1.7	14.7
Lodging	7.2	8.3
Food and Beverages Away From Home	0.5	4.7
Entertainment	1.2	8.4
TRAVEL PRICE INDEX	2.2	7.1
CONSUMER PRICE INDEX	0.2	5.0

Source: US Travel Data Center and the U.S. Bureau of Labor Statistics

More Pleasure Trips Cause June Travel Increase

Travel during June 1989 increased 5 percent over year-earlier levels, generated by a 8 percent increase in pleasure travel as well as a significant jump in business travel, reports the Data Center's National Travel Survey (NTS).

The monthly telephone survey showed that Americans took 130 million person-trips in June.



(A person-trip measures each time each person travels 100 miles or more away from home.)

The June NTS also found that:

- Vacation travel climbed 6 percent;
- Auto travel rose 5 percent, air travel, however, dropped 2 percent;
- Average trip duration fell from 4.8 nights per trip last year to 4.1 nights this June;
- Average round-trip distance decreased to 890 miles, down from 910 miles a year ago. ♦♦

TEIM Update

The Travel Economic Impact Model (TEIM) revision project team recently conducted a survey of all 50 states to collect state tax data that will be incorporated into the overall TEIM update process.

Also, with the help of the International Association of Convention & Visitor Bureaus' (IACVB) research task force, the TEIM project team is currently conducting a tax survey of IACVB's domestic membership. These city and county data will be used in conjunction with the city and county tax information gathered from other sources, such as the U.S. Department of Commerce.

With more detailed state and local tax data, the TEIM will be able to produce more precise estimates and forecasts of U.S. travel-generated tax revenue and its impact on the economy.

For more information about travel economic impact studies or the TEIM, contact Dr. William Fleming, manager of economic research for the US Travel Data Center, at 202/293-1040. ♦♦

TRAVEL PRINTOUT is published monthly by the US Travel Data Center, the national non-profit center for travel and tourism research, and an affiliate of the Travel Industry Association of America, Two Lafayette Center, 1133 21st Street, NW, Washington, D.C., 20036. Telephone:202/293-1040. Dr. Suzanne D. Cook, Director, Julie Bowers, Editor.

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News from the Data Center

On September 1, 1989, Edward R. Book was appointed the new president of the Travel Industry Association of America (TIA), succeeding William D. Toohey, who retired after nearly 19 years as TIA president. Book, who served TIA as executive vice president for the past two years, also assumes the position of vice chairman of the US Travel Data Center's board of trustees.

Prior to joining TIA in 1987, Book was chairman and chief executive officer of the Hershey Entertainment and Resort Corporation (HERCO). During his 18 years with HERCO, Book served the organization in a variety of capacities.

"The Data Center is very fortunate to have someone as qualified as Ned Book to help guide the organization," said Data Center Executive Director Suzanne Cook. "His extensive background in the travel industry, dedication to its continued growth, appreciation of the need for research and insight into the informational and marketing needs of the industry are qualities which will help us to shape programs and effectively serve our members and clients during the 1990s."

Recent additions to the Data Center's own staff include Elizabeth M. Stewart as the new manager of survey research. Just prior to joining the Data Center, Ms. Stewart served as manager of the Industry Analysis Division of the National Automobile Dealers Association where she supervised industry analysts and managed survey research projects. Ms. Stewart holds a master's degree in economics from George Mason University where she is currently working on her doctoral degree.

Also, Patrick Thompson has joined the staff as research assistant, succeeding Kelly Repass who has been promoted to survey research analyst. Robert Hayes joined the Data Center in June as computer analyst. ♦♦

Discoveries...

An ongoing guide to current travel research

♦ The Caribbean Tourism Organization has published the 1988 Caribbean Tourism Statistical Report, listing tourist arrivals and country of origin, cruise arrivals, hotel capacity and occupancy levels as well as visitor expenditures for 32 destinations. This report is available for $50 (plus $12 if by air mail) by writing to: Publications Officer, Caribbean Tourism Organization, Marine Gardens, Christ Church, Barbados.

♦ Despite a plunge in per-room profits, major hotel chains in the economy segment of the U.S. lodging industry continued to grow in 1988, according to Laventhol & Horwath's eighth annual report on the economy-hotel segment, U.S. Economy / Limited Service Lodging Industry 1989. This study covers profits, occupancy rates, development, expansion, and total room nights. Copies are $80. Write: Laventhol & Horwath, Leisure Time Industries Department, 1845 Walnut Street, Philadelphia, PA 19103; 215/299-1552.

♦ The Travel Market Leader, a journal of travel marketing,is a bimonthly newsletter covering trends and issues as they affect travel marketing decisions. Each issue delivers commentary by industry experts, sources for further travel marketing information, and provides a listing of major industry events and meetings. Subscriptions are $30 per year. Write: Daniel A. Nesbett, editor, P.O. Box 2397, Hickory Ln, Darien, CN, 06820. ♦♦

Visitor Volume at National Parks

Region	JUN 1989 visits	% Change from JUN 1988*	Year to Date % Change 1988/89*
NEW ENGLAND	1,905,409	7.8	9.5%
MIDDLE ATLANTIC	3,617,472	-5.8	0.2
SOUTH ATLANTIC	10,090,429	-8.6	-6.4
EAST SOUTH CENT.	2,361,869	-9.3	-4.1
EAST NORTH CENT.	840,462	-8.2	-6.7
WEST NORTH CENT.	1,497,024	-10.4	-2.8
WEST SOUTH CENT.	1,274,691	-6.8	1.9
MOUNTAIN	5,797,439	-0.4	2.6
PACIFIC	5,673,633	-3.1	-4.6
TOTAL	33,058,428	-5.2	-2.8

* Percent change figures may not be consistent with those previously reported due to National Park Service revisions.

States compromising the census regions:
New England: Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont. **Middle Atlantic:** New Jersey, New York Pennsylvania. South Atlantic: Delaware, District of Columbia, Florida, Georgia, Maryland, North Carolina, South Carolina, Virginia, West Virginia. **East South Central:** Alabama, Kentucky, Mississippi, Tennessee. **East North Central:** Illinois, Indiana, Michigan, Ohio, Wisconsin. **West North Central:** Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota, South Dakota. **West South Central:** Arkansas, Louisiana, Oklahoma, Texas. **Mountain:** Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, Wyoming. **Pacific:** Alaska, California, Hawaii, Oregon, Washington.

Current Travel Indicators

CURRENT TRAVEL INDICATORS...1989

	Month	Value	Units	Percent Change Last Month	Year Ago	Year To Date
Establishment Receipts or Retail Sales						
Hotels, Motels, Other Lodging Places(1)	Jun	$ 5,255	million	3.7	8.5	9.2
Eating and Drinking Places(2)	Jun	$13,676	million	0.2	5.6	7.4
Gasoline Service Stations(2)	Jun	$ 9,369	million	-0.9	10.7	7.0
Commercial Lodging Demand						
Hotel/Motel Occupancy Rates(3)	Jun	63.6	percent	-0.5	1.6	1.6
Real Demand for Commerical Lodging(4)	Jun	66.2	million	6.4	5.1	4.9
Airline Passenger Traffic (5)						
Domestic Revenue Passenger Miles	Jun	29.0	billion	11.4	3.0	-1.8
Int'l Revenue Passenger Miles	Jun	10.0	billion	19.8	10.5	10.8
Highway Traffic Volume (6)						
Rural Arterial Passenger Miles	Jun	46.3	billion	1.6	3.6	4.6
Rail Passenger Traffic (7)						
Amtrak Passenger Miles	Jun	523.1	million	3.2	-0.5	6.9
Travel Price Index (1982 - 84 = 100) (8)	Jun	127.1		0.6	5.7	5.1
U.S. Resident Travel						
Total Person-trips(9)	Jun	130.0	million	17.2	5.1	6.2
Vacation Person-trips(9)	Jun	94.6	million	32.9	5.7	9.3
Total Person-nights(10)	Jun	536.6	million	50.3	-9.3	-3.9
Vacation Person-nights(10)	Jun	411.5	million	62.0	-11.7	-0.6
Public Use of National Parks (11)						
Visits	Jun	33,058,428		24.3	5.2	-2.8
Overnight Stays	Jun	2,577,964		72.2	-1.0	0.0
Foreign Arrivals to the U.S.						
From Overseas(12)	May	1,113,348		7.7	7.7	13.9
From Canada(13)	Jun	1,068,899		-8.8	8.6	12.8
From Mexico(12)	May	89,457		12.6	32.5	30.9
U.S. Citizen Departures						
To Overseas(12)	May	1,284,700		16.3	10.2	5.8
To Canada(13)	Jun	1,540,706		50.0	1.2	-2.4
Domestic Demand for Gasoline						
Barrels/Day(14)	Jun	7,803	thousand	5.2	-0.2	0.0

(1) Source: Smith Travel Research, seasonally unadjusted. (2) Preliminary; revised monthly. Source: Bureau of the Census. (3) Source: Smith Travel Research, seasonally adjusted, 1986 and 1987 data have been revised. (4) Smith Travel Research, unadjusted room nights sold. (5) Preliminary; U.S. scheduled service air carriers. Source: Air Transport Association. (6) Preliminary; revised monthly. Source: Federal Highway Administration. (7) Source: National Railroad Passenger Corporation (Amtrak). (8) Source: US Travel Data Center and Bureau of Labor Statistics. (9) Source: US Travel Data Center. (10) US Travel Data Center. Data is not comparable to earlier published numbers due to revised methodology. (11) Preliminary; unadjusted for differences in reporting units. Source: National Park Service. (12) Source: U.S. Travel and Tourism Administration. Mexican data reflect 9% arrivals only. (13) Statistics Canada. (14) Preliminary; Source: U.S. Department of Energy.

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